

LEVEL 3 FRANKFURT (3-DAY) SEMINAR SCHEDULE 2008

SYLLABUS

LEVEL 3

This is a guideline syllabus, and minor adjustments to the time blocks by the instructor are to be anticipated. There will 15-minute breaks at approximately 10:15 am, 3:15 pm and 5:15 pm. Lunch and coffee breaks are included. In consideration of others, please return promptly from breaks, turn off cell phones and pagers, and refrain from smoking. Thank you.

THURSDAY - MARCH 27

Time	Topic	Study Session	Instructor
8:30 – 10:15	Behavioral Finance	3	Erik Benrud, CFA
10:30 – 12:15	Private Wealth Management	4	Erik Benrud, CFA
1:30 – 3:15	Private Wealth Management	4	Erik Benrud, CFA
3:30 – 5:15	Private Wealth Management: And Portfolio Management for Institutional Investors	4, 5	Erik Benrud, CFA
5:30 – 6:30	Portfolio Management for Institutional Investors	5	Erik Benrud, CFA

FRIDAY - MARCH 28

Time	Topic	Study Session	Instructor
8:30 – 10:15	Economic Concepts for Asset Valuation in Portfolio Management	6	Erik Benrud, CFA
10:30 – 12:15	Asset Allocation: And Management of Passive and Active Fixed Income Portfolios	7, 8	Erik Benrud, CFA
1:30 – 3:15	Management of Passive and Active Fixed Income Portfolios: And Portfolio Management of Global Bonds and Fixed Income Derivatives	8, 9	Erik Benrud, CFA
3:30 – 5:15	Equity Portfolio Management	10	Erik Benrud, CFA
5:30 – 6:30	Equity Portfolio Management	10	Erik Benrud, CFA

SATURDAY - MARCH 29

Time	Topic	Study Session	Instructor
8:30 – 10:15	Alternative Investments for Portfolio Management	11	Erik Benrud, CFA
10:30 – 12:15	Risk Management: And Risk Management Applications of Derivatives	12, 13	Erik Benrud, CFA
1:30 – 3:15	Execution of Portfolio Decisions: And Monitoring and Rebalancing	14, 15	Erik Benrud, CFA
3:30 – 5:15	Performance Evaluation and Attribution: And Portfolio Management in a Global Context	16, 17	Erik Benrud, CFA
5:30 – 6:30	Global Investment Performance Standards	18	Erik Benrud, CFA

Instructor's Area of Specialty

Erik Benrud, PhD, CFA	All Study Sessions
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