

LEVEL 3 ZURICH (5-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.

MONDAY - APRIL 21

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

TUESDAY - APRIL 22

Time	Topic	Study Session	Instructor
8:30 – 10:15	Equity Portfolio Management	10	Marc LeFebvre, CFA
10:30 – 12:15	Portfolio Management in a Global Context	17	Larry Lockwood, CFA
1:30 – 3:15	Portfolio Management in a Global Context	17	Larry Lockwood, CFA
3:30 – 5:15	Economic Concepts for Asset Valuation in Portfolio Management	6	Steve Nightingale, CFA
5:30 – 6:30	Economic Concepts for Asset Valuation in Portfolio Management	6	Steve Nightingale, CFA

WEDNESDAY - APRIL 23

Time	Topic	Study Session	Instructor
8:30 – 10:15	Code of Ethics and Professional Standards: Ethical and Professional Standards in Practice; and Preparing for the Exam/How CFA Exams are Graded	1, 2	Dave Wiley, CFA
10:30 – 12:15	Economic Concepts for Asset Valuation in Portfolio Management: And Management of Passive and Active Fixed Income Portfolios	6, 8	Steve Nightingale, CFA
1:30 – 3:15	Management of Passive and Active Fixed Income Portfolios: And Portfolio Management of Global Bonds and Fixed Derivatives	8, 9	Steve Nightingale, CFA
3:30 – 5:15	Portfolio Management of Global Bonds and Fixed Income Derivatives: And Risk Management Applications of Derivatives	9, 13	Steve Nightingale, CFA
5:30 – 6:30	Risk Management Applications of Derivatives	13	Steve Nightingale, CFA

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THURSDAY - APRIL 24

Time	Topic	Study Session	Instructor
8:30 – 10:15	Asset Allocation: And Alternative Investments for Portfolio Management	7, 11	Marc LeFebvre, CFA
10:30 – 12:15	Alternative Investments for Portfolio Management	11	Marc LeFebvre, CFA
1:30 – 3:15	Risk Management	12	Marc LeFebvre, CFA
3:30 – 5:15	Execution of Portfolio Decisions: And Monitoring and Rebalancing	14, 15	Marc LeFebvre, CFA
5:30 – 6:30	Performance Evaluation and Attribution	16	Marc LeFebvre, CFA

FRIDAY - APRIL 25

Time	Topic	Study Session	Instructor
8:30 – 10:15	Performance Evaluation and Attribution	16	Marc LeFebvre, CFA
10:30 – 12:15	Global Investment Performance Standards	18	Marc LeFebvre, CFA

Instructor's Area of Specialty

Marc LeFebvre, CFA	Port Mgmt/Equity/Performance Evaluation and Attribution/GIPS/Asset Allocation/Behavioral Fin./Private Wealth Mgmt/Alternative Invest/Risk Mgmt
Larry Lockwood, PhD, CFA	Quantitative Methods/Portfolio Management
Steve Nightingale, CFA	Fixed Income/Derivatives/Economics for Portfolio Management
Dave Wiley, CFA	Ethical and Professional Standards