

2:05 - 3:00 pm

October 21, 2009

ADVANCED ASSET ALLOCATION
2009 Symposium: Planning for Success

Jacob Wolkowitz and Eric Bjorgen will discuss advanced asset allocation strategies and techniques. By attending this session, you will hear why contrarian factors did not work in 2008, and what is changing going forward. Topics covered include:

- Description of Tactical Asset Allocation Model
- Anomalies in Stock/Bond returns
- Current outlook & where we are investing now
- Questions/Answers

LEARNING OBJECTIVES:

By the end of the session, students will:

- Be introduced to the concept of disciplines in asset allocation
- Be able to relate how recent events changed disciplines going forward
- Learn where managers are investing now

DETAILED CONTENT OUTLINE:

- Description of Tactical Asset Allocation Model (20 minutes)
 - Why contrarian factors didn't work in 2008 and the first half of 2009
 - What has changed – going forward
 - Value of discipline
- Anomalies in Stock/Bond returns (15 minutes)
 - Bonds beat Stocks in almost every time frame
- Current outlook and where we are investing now, including Stocks/Bonds afterwards (15 minutes)
- Questions/Answers (5 minutes)

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