

1:00 - 1:55 pm

October 21, 2009

## **BASIC ASSET ALLOCATION**

### **2009 Symposium: Planning for Success**

**Jacob Wolkowitz and Eric Bjorgen** will discuss basic asset allocation strategies and techniques. By attending this session, you will learn the value of discipline and how to employ asset allocation strategies. You will also be able to distinguish between lagging and leading market indicators. Topics covered include:

- Description of Tactical Asset Allocation process
- Thinking outside the box
- Current outlook on various asset classes
- Questions/Answers

**LEARNING OBJECTIVES:** By the end of the session, students will:

- Learn various approaches to asset allocation
- Learn how this determines our current outlook
- Learn the value of flexibility

**DETAILED CONTENT OUTLINE:**

- Description of Tactical Asset Allocation process (15 minutes)
  - Brief summary of model
  - Value of disciplines
  - How we employ the strategy
- Thinking outside the box (17 minutes)
  - Value of discipline
  - Developing a tool kit for strategy
- Current outlook on various asset classes (18 minutes)
  - Market as a leading indicator
- Questions/Answers (5 minutes)

**INSTRUCTORS:**

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