

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

SATURDAY, MAY 3

SATURDAY, MAY 3rd, 2008

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
9:00 - 12:00	Registration at Alumni Hall			
12:00 - 1:30	Lunch in Vanier Hall			
1:30 - 3:00	Management of Passive and Active Fixed Income Portfolios Instructor: Dr. Mitch Conover, CFA	8	3	1.50
3:00 - 3:15	Break			
3:15 - 4:00	Management of Passive and Active Fixed Income Portfolios Instructor: Dr. Mitch Conover, CFA	8	3	0.75
4:00 - 5:30	Portfolio Management of Global Bonds & Fixed Income Derivatives Instructor: Dr. Mitch Conover, CFA	9	3	1.50
5:30 - 6:45	Dinner in Vanier Hall			
7:00 - 8:30	Portfolio Management of Global Bonds & Fixed Income Derivatives Instructor: Dr. Mitch Conover, CFA	9	3	1.50

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

SUNDAY, MAY 4

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
8:45 - 10:30	Portfolio Management of Global Bonds & Fixed Income Derivatives; and Equity Portfolio Management Instructor: Dr. Mitch Conover, CFA	9, 10	3	1.75
10:30 - 10:45	Break			
10:45 - 12:30	Equity Portfolio Management and Alternative Investments for Portfolio Management Instructor: Dr. Mitch Conover, CFA	10, 11	3	1.75
12:30 - 1:45	Lunch in Vanier Hall			
1:45 - 3:45	Alternative Investments for Portfolio Management Instructor: Dr. Mitch Conover, CFA	11	3	2.00
3:45 - 4:00	Break			
4:00 - 5:30	Risk Management Instructor: Dr. Mitch Conover, CFA	12	3	1.50
5:30 - 6:45	Dinner in Vanier Hall - No Evening Classes			

SUNDAY, MAY 4th, 2008

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

MONDAY, MAY 5

MONDAY, MAY 5th, 2008

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
8:45 - 10:30	Risk Management Applications of Derivatives Instructor: Dr. Mitch Conover, CFA	13	3	1.75
10:30 - 10:45	Break			
10:45 - 12:15	Risk Management Applications of Derivatives; and Performance Evaluation and Attribution Instructor: Dr. Mitch Conover, CFA	13, 16	3	1.50
12:15 - 1:30	Lunch in Vanier Hall			
1:30 - 3:30	Performance Evaluation and Attribution Instructor: Dr. Mitch Conover, CFA	16	3, 5	2.00
3:30 - 3:45	Break			
3:45 - 5:30	Economic Concepts for Asset Valuation in Portfolio Management Instructor: Dr. Mitch Conover, CFA	6	2	1.75
5:30 - 6:45	Dinner in Vanier Hall			
7:00 - 8:30	Global Investment Performance Standards Instructor: Dr. Mitch Conover, CFA	18	5	1.50

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

TUESDAY, MAY 6

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
8:45 - 10:15	Behavioral Finance Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	3	1	1.50
10:15 - 10:30	Break			
10:30 - 12:30	Code of Ethics & Professional Standards; and Ethical & Professional Standards in Practice; How the CFA Exams are Graded Instructor: Mr. Dave Wiley, CFA	1, 2	1	2.00
12:30 - 1:45	Lunch in Vanier Hall			
1:45 - 3:30	Behavioral Finance: and Private Wealth Management Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	3, 4	2	1.75
3:30 - 3:45	Break			
3:45 - 5:30	Private Wealth Management Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	4	2	1.75
5:30 - 7:00	Dinner in Vanier Hall - No Evening Classes			
7:00 - 10:00	Optional Sign-Up for Tutoring Sessions			

TUESDAY, MAY 6th, 2008

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

WEDNESDAY, MAY 7

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
8:45 - 10:00	Private Wealth Management Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	4	2	1.25
10:00 - 10:15	Break			
10:15 - 12:30	Private Wealth Management and Portfolio Management for Institutional Investors Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	4, 5	2	2.25
12:30 - 1:45	Lunch in Vanier Hall			
1:45 - 3:30	Portfolio Management for Institutional Investors Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	5	2	1.75
3:30 - 3:45	Break			
3:45 - 5:30	Asset Allocation Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	7	2	1.75
5:30 - 6:45	Dinner in Vanier Hall			
7:00 - 8:30	Tutorial and Test Taking Strategies with Dr. Greg Filbeck, CFA, FRM, CAIA			
7:00 - 10:00	Optional Sign-Up for Tutoring Sessions			

WEDNESDAY, MAY 7th, 2008

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

THURSDAY, MAY 8

THURSDAY, MAY 8th, 2008

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:15	Breakfast in Vanier Hall			
8:30 - 9:00	Asset Allocation Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	7	2	0.50
9:00 - 10:45	Execution of Portfolio Decisions and Monitoring & Rebalancing Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	14,15	5	1.75
10:45 - 11:00	Break			
11:00 - 11:45	Portfolio Management in Global Context Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	17	5	0.75
11:45 - 12:45	Lunch in Vanier Hall			
12:45 - 2:15	Portfolio Management in a Global Context and Overall Level 3 Wrap-Up Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA	17	5	1.5
2:15 - 2:30	Break (Will be set up until 3:30)			
2:30 - 5:30	Sample Exam			
5:45 - 7:00	Dinner in Vanier Hall - No Evening Classes			
6:00 - 9:00	Optional Sign-Up for Tutoring Sessions			
8:30 - 11:00	End of the Week Party			

STUDY SEMINAR FOR FINANCIAL ANALYSTS®

AT THE UNIVERSITY OF WINDSOR

MAY 3-9, 2008

2008 Level 3 Syllabus

This syllabus is provided as a rough outline of the day's activities and is subject to change.
Please be kind to your neighbor. Refrain from using cellular phones, pagers, and any other device/behavior that may be detrimental to the group's focus. We appreciate your consideration.

FRIDAY, MAY 9

TIME	TOPIC & INSTRUCTOR	STUDY SESSIONS	BOOKS	HOURS
7:00 - 8:30	Breakfast in Vanier Hall			
9:00 - 10:15	Review & Answers to the Sample Exam Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA			
10:15 - 10:30	Break			
10:30 - 12:00	Review & Answers to the Sample Exam Instructor: Dr. Greg Filbeck, CFA, FRM, CAIA			
9:00 - 12:00	Optional Sign-Up for Tutoring Sessions			
12:00 (noon)	Seminar Closes - GOOD LUCK on the Exam on June 7!			

FRIDAY, MAY 9th, 2008