

2012 | WINDSOR WEEK™ PROGRAM SCHEDULE

This schedule 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.

TIME	TOPIC(S)	STUDY SESSION	INSTRUCTOR
SATURDAY, MAY 5, 2012			
7:00 - 8:30 am	Breakfast in Vanier Hall		
9:00 am - 12:00 pm	Registration in Alumni Hall		
12:00 - 1:30 pm	Lunch in Vanier Hall		
1:30 - 3:00 pm	Behavioral Finance	3	Dr. Greg Filbeck, CFA, FRM, CAIA
3:00 - 3:15 pm	Break		
3:15 - 5:30 pm	Behavioral Finance; and Private Wealth Management	3, 4	Dr. Greg Filbeck, CFA, FRM, CAIA
5:30 - 6:45 pm	Dinner in Vanier Hall		
7:00 - 8:30 pm	Private Wealth Management	4	Dr. Greg Filbeck, CFA, FRM, CAIA
SUNDAY, MAY 6, 2012			
7:00 - 8:30 am	Breakfast in Vanier Hall		
8:45 - 10:30 am	Private Wealth Management	4	Dr. Greg Filbeck, CFA, FRM, CAIA
10:30 - 10:45 am	Break		
10:45 am - 12:30 pm	Portfolio Management for Institutional Investors	5	Dr. Greg Filbeck, CFA, FRM, CAIA
12:30 - 1:45 pm	Lunch in Vanier Hall		
1:45 - 3:45 pm	Portfolio Management for Institutional Investors; and Capital Market Expectations in Portfolio Management	5, 6	Dr. Greg Filbeck, CFA, FRM, CAIA
3:45 - 4:00 pm	Break		
4:00 - 5:30 pm	Capital Market Expectations in Portfolio Management	6	Dr. Greg Filbeck, CFA, FRM, CAIA
5:30 - 7:00 pm	Dinner in Vanier Hall - <i>No evening classes</i>		
MONDAY, MAY 7, 2012			
7:00 - 8:30 am	Breakfast in Vanier Hall		
8:45 - 10:30 am	Economic Concepts for Asset Valuation in Portfolio Management; and Asset Allocation	7, 8	Dr. Greg Filbeck, CFA, FRM, CAIA
10:30 - 10:45 am	Break		
10:45 am - 12:15 pm	Asset Allocation	8	Dr. Greg Filbeck, CFA, FRM, CAIA
12:15 - 1:30 pm	Lunch in Vanier Hall		
1:30 - 3:30 pm	Asset Allocation; and Management of Passive and Active Fixed Income Portfolios	8, 9	Dr. Greg Filbeck, CFA, FRM, CAIA
3:30 - 3:45 pm	Break		
3:45 - 5:30 pm	Management of Passive and Active Fixed Income Portfolios	9	Dr. Greg Filbeck, CFA, FRM, CAIA
5:30 - 6:45 pm	Dinner in Vanier Hall		
7:00 - 8:30 pm	Portfolio Management of Global Bonds & Fixed Income Derivatives	10	Dr. Greg Filbeck, CFA, FRM, CAIA
TUESDAY, MAY 8, 2012			
7:00 - 8:30 am	Breakfast in Vanier Hall		
8:45 - 10:15 am	Portfolio Management of Global Bonds & Fixed Income Derivatives	10	Dr. John Broussard, CFA, FRM, PRM
10:15 - 10:30 am	Break		
10:30 am - 12:30 pm	Equity Portfolio Management	11	Dr. John Broussard, CFA, FRM, PRM
12:30 - 1:45 pm	Lunch in Vanier Hall		

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TIME	TOPIC(S)	STUDY SESSION	INSTRUCTOR
TUESDAY, MAY 8, 2012 CONTINUED...			
1:45 - 3:30 pm	Equity Portfolio Management	11, 12	Dr. John Broussard, CFA, FRM, PRM
3:30 - 3:45 pm	Break		
3:45 - 5:30 pm	Equity Portfolio Management	12	Dr. John Broussard, CFA, FRM, PRM
5:30 - 6:45 pm	Dinner in Vanier Hall		
6:00 - 10:00 pm	<i>Optional Sign-Up Tutoring Sessions</i>		
7:00 - 8:30 pm	Alternative Investments for Portfolio Management	13	Dr. John Broussard, CFA, FRM, PRM
WEDNESDAY, MAY 9, 2012			
7:00 - 8:15 am	Breakfast in Vanier Hall		
8:30 - 10:00 am	Risk Management	14	Dr. John Broussard, CFA, FRM, PRM
10:00 - 10:15 am	Break		
10:15 am - 12:00 pm	Risk Management Applications of Derivatives	15	Dr. John Broussard, CFA, FRM, PRM
12:00 - 1:15 pm	Lunch in Vanier Hall		
1:15 - 3:30 pm	Tutorial and Test Taking Strategies	All	Dr. John Broussard, CFA, FRM, PRM
3:30 - 3:45 pm	Break		
3:45 - 5:30 pm	Code of Ethics & Standards of Professional Conduct; and Ethical & Professional Standards in Practice; How the CFA Exams Are Graded	1, 2	Dave Wiley, CFA
5:30 - 6:45 pm	Dinner in Vanier Hall		
6:00 - 10:00 pm	<i>Optional Sign-Up Tutoring Sessions</i>		
7:00 - 8:30 pm	Code of Ethics & Standards of Professional Conduct; and Ethical & Professional Standards in Practice; How the CFA Exams Are Graded	1, 2	Dave Wiley, CFA
THURSDAY, MAY 10, 2012			
7:00 - 8:15 am	Breakfast in Vanier Hall		
8:30 - 10:45 am	Execution of Portfolio Decisions: Monitoring & Rebalancing; and Performance Evaluation and Attribution	16, 17	Dr. John Broussard, CFA, FRM, PRM
10:45 - 11:00 am	Break		
11:00 - 11:45 am	Performance Evaluation and Attribution; and Global Investment Performance Standards	17, 18	Dr. John Broussard, CFA, FRM, PRM
11:45 am - 12:45 pm	Lunch in Vanier Hall		
12:45 - 1:45 pm	Global Investment Performance Standards	18	Dr. John Broussard, CFA, FRM, PRM
1:45 - 2:15 pm	Overall Level III Wrap Up		Dr. John Broussard, CFA, FRM, PRM
2:15 - 2:30 pm	Break (will be set up until 3:30)		
2:30 - 5:30 pm	Sample Exam		
5:30 - 7:00 pm	Dinner in Vanier Hall - <i>No evening classes</i>		
5:00 - 9:00 pm	<i>Optional Sign-Up Tutoring Sessions</i>		
8:30 - 11:00 pm	End of Week Party		
FRIDAY, MAY 11, 2012			
7:00 - 8:45 am	Breakfast in Vanier Hall		
7:30 am - 12:00 pm	<i>Optional Sign-Up Tutoring Sessions</i>		
9:00 - 10:15 am	Review & Answers to the Sample Exam		Dr. Bruce Kuhlman, CFA, CAIA
10:15 - 10:30 am	Break		
10:30 am - 12:00 pm	Review & Answers to the Sample Exam		Dr. Bruce Kuhlman, CFA, CAIA
12:00 (noon)	Seminar is Finished - GOOD LUCK on the Exam June 2		