

Investment Strategies for Private Clients

22 March 2007
15:00-18:30
Room Manfredini
Università Bocconi
Via Sarfatti 25, Milano



**Università Commerciale
Luigi Bocconi**

NEWFIN
**Centre for Research
on Financial Innovation**

Master of Science in Finance



Member of CFA Institute

In collaboration with



Assisting high-net-worth individuals in their investment decisions has become through time an increasingly complex task, due to both the development of new asset classes in the continuous quest for product innovation and risk diversification, and to the increasing importance that is attributed to behavioral finance patterns in shaping individual investment decisions. The 2007 CFA Institute Travelling Conference aims to provide the opportunity to learn from key industry experts on these topics, and publicly debate their implications for the private wealth management business. The conference is organized jointly by the Italian CFA Society, Bocconi's Master of Science in Finance (that in 2006 was one of the first five graduate programs worldwide to be recognized as CFA Program Partner), NEWFIN - Centre for Research on Financial Innovation and Barclays Capital. This conference qualifies for credit under the guidelines for the CFA Institute Professional Development Program and is eligible for 3 credit hours.

The participation is free

Registration

Welcome Address and Introduction

Francesco Saita

Vice-Director NEWFIN
and Director Master of Science in Finance,
Università Bocconi

Gabriele Montalbetti, CFA

President Italian CFA Society

The Evolution of the Wealth Industry: A Personal Philosophy

Tom Kalaris

Chief Executive
Barclays Wealth Management, London

Beyond Modern Portfolio Theory: Moving from the Aggregate to the Individual

Kristoffer Jonsson

Head of Strategy and Business Development
Merrill Lynch Bank, Geneva

Coffee break

Behavioural Finance: Insights into Irrational Minds and Markets

James Montier

Global Equity Strategist
Dresdner Kleinwort, London

Alternative Beta: A New View on Alternative Investments

Maurus Bossi, CFA

Chairman and CEO
AlphaSwiss Group
Zurich, Switzerland

Conclusions

For information

NEWFIN

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E-mail: newfin@unibocconi.it

Registration

Surname

Name

Position

Firm

Address

City

Zip Code

Phone

Fax

E-mail

I give my consent to the treatment of my personal data according to D.lsg 196/2003

Date

Signature

Please return this registration form via fax to +39 02 5836.5921

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