70th CFA Institute Annual Conference

Sharpen Your Investment Edge
21–24 May 2017
Pennsylvania Convention Center
Philadelphia, PA, USA

The attendee will:

- Explore the global macroeconomic challenges facing policymakers in developed economies, and prospects for economic reforms
- Discuss the impact of current technological trends on the asset management and advisory businesses and on professional work in general
- Learn about demographic and geopolitical trends affecting markets and economies
- Explore best practices in active and passive fund management
- Participate in extended 90 minute sessions to allow for a deeper analysis and to help hone skills in – investment techniques and approaches, using behavioral finance to improve investment analysis, understanding new and evolving payment systems, and how to best manage for firm growth
- Learn new approaches to asset allocation and increasing returns
- Explore approaches to manage investment risk
- Learn how to use historical analysis to better implement investment strategies
- Sharpen techniques for allocating investments among asset classes, strategies, and risks globally
- Explore career development, career change, and leadership issues
- Apply new investment research and implement alternative strategies in global portfolios
- Find value in global equity and credit markets and explore opportunities in emerging and frontier markets
- Improve the integration of ESG (environmental, social, and governance) considerations in securities analysis and risk management processes
- Explore the degree to which changes in regulation and capital requirements have affected the global bond markets and analyze assumptions and strategies for bond market investing
- Explore basic principles and promising directions in behavioral finance and gain a better understanding of how behavioral finance can improve financial decision making
- Analyze the client advisory process and how to best work with private wealth clients for greater success in ordinary times, and during the most stressful transitions in their lives.
- Explore good governance practices at investment firms that contribute to better investment decisions and greater effectiveness
- Learn how to identify dangers that can impact investment decisions
- Explore the future of finance and discover policies that can help shape a trustworthy, forward-thinking financial industry that better serves society

Credit Amount

- CFA Institute CE Program: Qualifies for 19.5 credit hours, including up to 3 hours in the content areas of Standards, Ethics, and Regulations (SER).
- NASBA: 23 credit hours in the content area of Finance, including up to 3.5 hours in the content of Regulatory Ethics.

Additional Information

- Delivery Method: Group Live
- Program Level: Intermediate
- Prerequisites: Finance
- Advanced Preparation: None

For additional information on the 70th CFA Institute Annual Conference, please visit the [conference page.]

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