

SAMPLE PROGRAM - SUBJECT TO CHANGE

TIME	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:30am		Breakfast Optional Special Interest Groups	Breakfast Optional Special Interest Groups	Breakfast Optional Special Interest Groups	Breakfast Case Study Preparation	Breakfast
8:00am						
8:30am		Historical Returns in U.S. Markets Dick Marston	Performance Measurement and Manager Evaluation Craig Mackinlay	Asset Allocation I Dick Marston	Wealth Management Unwrapped: Part I Charlotte Beyer	Case Study Group Presentations Dick Marston
9:00am	PHILADELPHIA PROGRAM					
9:30am						
10:00am	Break	Break	Break	Break	Break	Break
10:30am	Modern Portfolio Theory Jeff Jaffe	Performance Measurement and Manager Evaluation (continued) Craig Mackinlay	Private Equity Dick Marston	Wealth Transfer and the Next Generation TBA	Case Study Discussion Dick Marston	Case Study Discussion Dick Marston
11:00am						
11:30am	Class Photo	Break	Break			Charlotte Beyer <i>Turn in Course Evaluation</i>
12:00pm	Check-in	Lunch Optional Special Interest Groups	Lunch Optional Special Interest Groups	Lunch	Lunch	Lunch
12:30pm	Steinberg Conference Center 255 S. 38th Street Philadelphia, PA 19104 Phone: 215-898-8300 Fax: 215-573-3426					Adjourn
1:00pm		Modern Portfolio Theory (continued) Jeff Jaffe	Assessing Risk: Critical Decision Making for the Individual Investor Kathy Pearson	Hedge Funds Chris Geczy	Asset Allocation II Dick Marston	
1:30pm						
2:00pm		Break	Break	Break		
2:30pm		Real Estate Joe Gyourko	Assessing Risk: Critical Decision Making for the Individual Investor (continued) Kathy Pearson	Hedge Funds (continued) Chris Geczy	Break	
3:00pm						
3:30pm					Case Study Preparation	
4:00pm		Break				
4:30pm		Zephyr Software Training		Optional Hedge Funds Q&A (continued) with Chris Geczy		
5:00pm	Registration and Cocktail Reception Steinberg Conference Center	Break			Graduation Dinner Hosted by OppenheimerFunds	
5:30pm			Optional TA Office Hours			
6:00pm	Dinner	Special Interest Dinner	Dinner	Optional Dinner		
6:30pm				Free Evening		
7:00pm		The Financial Crisis: How We Got Here and What Should We Do? Kent Smetters				
7:30pm	Program Introduction and Case Study Discussion Dick Marston, Charlotte Beyer					
8:00pm						
8:30pm						
9:00pm						
9:30pm						
10:00pm						



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