

TIME	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
7:30am		Breakfast Optional Special Interest Groups	Breakfast Optional Special Interest Groups	Breakfast Case Study Preparation	Breakfast Case Study Preparation
8:00am					
8:30am	SAN FRANCISCO	Historical Returns in Equity Markets Dick Marston	Performance Measurement and Manager Evaluation Craig MacKinlay	Hedge Funds Chris Gezy	Breakfast Case Study Group Presentations
9:00am	PROGRAM				
9:30am					
10:00am		Break	Break	Break	Break
10:30am		Modern Portfolio Theory Jeff Jaffe	Performance Measurement and Manager Evaluation (continued) Craig MacKinlay	Hedge Funds (continued) Chris Gezy	Case Study and Best Practices Discussion Wealth Management Unwrapped - Part II Dick Marston / Charlotte Beyer
11:00am					
11:30pm		Class Photo	Lunch Optional Special Interest Groups	Lunch and Case Study Preparation	Lunch Turn in Course Evaluation at Conclusion of Program
12:00pm		Lunch Optional Special Interest Groups			
12:30pm					
1:00pm		Modern Portfolio Theory (continued) Jeff Jaffe	Asset Allocation I Dick Marston	Assessing Risk: Critical Decision Making for the Individual Investor Kathy Pearson	Adjourn
1:30pm					
2:00pm					
2:30pm		Break	Break		
3:00pm		Wealth Management Unwrapped I Charlotte Beyer	Asset Allocation II Dick Marston	Break	
3:30pm				TBA	
4:00pm	Wharton San Francisco 2 Harrison Street, Sixth Floor San Francisco, CA 94105 Phone: 415-777-1000	Break	Case Study Preparation	Break	
4:30pm		Software Training for Zephyr Dick Marston			
5:00pm		Case Study Preparation		Case Study Preparation	
5:30pm	Registration and Cocktail Reception				
6:00pm	Dinner	Dinner		Free Time	
6:30pm				Graduation Dinner Hosted by OppenheimerFunds	
7:00pm					
7:30pm	Program Introduction and Case Study Discussion Dick Marston / Charlotte Beyer				
8:00pm					
8:30pm					
9:00pm					
9:30pm					



Faculty Director
Dick Marston

Program Director
Shannon McAllinden

Program Coordinator
Anastasia Bokas

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OppenheimerFunds
The Right Way to Invest