

CFASF 2010 Level III Class - Wednesday Evenings

Updated 12.8.10



Time: 6:00 - 8:30*

Wk	Time*	Date	Instructor	Session	Topic
1	6:00 - 8:30 pm	January 13, 2010	Veitch	"6 & 7"	Capital Mkt Expectations & Economic Concepts
2	6:00 - 8:30 pm	January 20, 2010	Kale	"11"	Equity Portfolio Management
3	6:00 - 8:30 pm	January 27, 2010	Cronin	1	Code of Ethics & Standards of Professional Conduct
4	6:00 - 8:30 pm	February 3, 2010	Cronin	2	Ethical & Professional Standards in Practice
5	6:00 - 8:30 pm	February 10, 2010	Veitch	14	Risk Management
6	6:00 - 8:30 pm	February 17, 2010	Veitch	17	Performance Evaluation & Attribution
7	6:00 - 8:30 pm	February 24, 2010	Lablanc	3	Behavioral Finance
8	6:00 - 8:30 pm	March 3, 2010	Barve	18	Global Investment Performance Standards (GIPS)
9	6:00 - 8:30 pm	March 10, 2010	Masse	"12"	Equity Portfolio Management: Special Issues - Global Context**
10	6:00 - 8:30 pm	March 17, 2010	Cronin	4	Private Wealth Management
11	6:00 - 8:30 pm	March 24, 2010	Collins	5	Portfolio Management for Institutional Investors
12	6:00 - 8:30 pm	March 31, 2010	Kouznetsova	13	Alternative Investments for Portfolio Management
13	6:00 - 8:30 pm	April 7, 2010	Collins	8	Asset Allocation
14	6:00 - 8:30 pm	April 14, 2010	Collins	16	Execution of Portfolio Decisions, Monitoring & Rebalancing
15	6:00 - 8:30 pm	April 21, 2010	Burns	9	Management of Passive and Active Fixed-Income Portfolios
16	6:00 - 8:30 pm	April 28, 2010	Burns	10	Portfolio Management of Global Bonds & FI Derivatives
17	6:00 - 8:30 pm	May 5, 2010	Barve	15a	Risk Management Applications of Derivatives 1
18	6:00 - 8:30 pm	May 12, 2010	Barve	15b	Risk Management Applications of Derivatives 2

* Due to the content of certain study sessions, some classes may not go the full 2 1/2 hours.

This schedule is subject to change

SS 7, 11, 12, & 14 do not follow the readings assigned by CFA Institute. Please see page 2 for details

CFASF's Level III Review Course will teach the international topics together in a revised study session 12. In our opinion, it is a better way to approach the material.

As such, CFASF's Level III Review has made the following changes to the reading presentation from CFA Institute's Study Guides. Study Sessions 6, 7, 11, 12, & 14 affected are as follows:

1. JANUARY 13, 2010 - COMBINED STUDY SESSION 6 & 7:

STUDY SESSION 6 – CAPITAL MARKET EXPECTATIONS IN PORTFOLIO MANAGEMENT

Reading 23: Capital Market Expectations

STUDY SESSION 7 – ECONOMIC CONCEPTS FOR ASSET VALUATION IN PORTFOLIO MANAGEMENT

Reading 24: Macroanalysis and Microvaluation of the Stock Market

~~Reading 25: Dreaming with BRICs: The Path to 2050~~ Moved to SS#12

2. JANUARY 20, 2010 - STUDY SESSION 11 – EQUITY PORTFOLIO MANAGEMENT

Reading 32: Equity Portfolio Management

Reading 33 from Study Session 12: Corporate Governance

3. MARCH 10, 2010 - STUDY SESSION 12 – SPECIAL ISSUES IN EQUITY PORTFOLIO MANAGEMENT

~~Reading 33: Corporate Governance~~ Moved to SS#11

Reading 34: International Equity Benchmarks

Reading 35: Emerging Markets Finance

Reading 25 from Study Session 7: Dreaming with BRIC's – The Path to 2050

Reading 40 from Study Session 14: Currency Risk Management

4. FEBRUARY 10, 2010 - STUDY SESSION 14 – RISK MANAGEMENT

Reading 39: Risk Management

~~Reading 40: Currency Risk Management~~ Moved to SS#12