

CFASF 2012 Level III Class - Wednesday Evenings

Updated 1.1.12

Time: 6:00 - 8:30*



Wk	Time*	Date	Instructor	Session	Topic
1	6:00 - 8:30 pm	11-Jan	Kale	"11"	Equity Portfolio Mgmt**
2	6:00 - 8:30 pm	18-Jan	Veitch	"6 & 7"	Capital Mkt Expectations & Economic Concepts
3	6:00 - 8:30 pm	25-Jan	Veitch	17	Performance Eval & Attrib
4	6:00 - 8:30 pm	1-Feb	Veitch / Masse	14 / "12"	Risk Management**
5	6:00 - 8:30 pm	8-Feb	Masse	"12"	Special Issues - PM in a Global Context**
6	6:00 - 8:30 pm	15-Feb	Barve	18	GIPS
7	6:00 - 8:30 pm	22-Feb	Burns	9	Mgmt of Fixed Income
8	6:00 - 8:30 pm	29-Feb	Burns	10	Mgmt of Global Bonds & FI Derivatives
9	6:00 - 8:30 pm	7-Mar	Lablanc	3	Behavioral Finance
10	6:00 - 8:30 pm	14-Mar	Cronin	1	Ethics
11	6:00 - 8:30 pm	21-Mar	Cronin	2	Ethics in Practice
12	6:00 - 8:30 pm	28-Mar	Cronin	4	Private Wealth Mgmt
13	6:00 - 8:30 pm	4-Apr	Collins	8	Asset Allocation
14	6:00 - 8:30 pm	11-Apr	Collins	5	Institutional Investors
15	6:00 - 8:30 pm	18-Apr	Collins	16	Execution, Monitoring & Rebalancing
16	6:00 - 8:30 pm	25-Apr	Barve	15a	Risk Mgmt & Derivatives
17	6:00 - 8:30 pm	2-May	Barve	15b	Risk Mgmt & Derivatives
18	6:00 - 8:30 pm	9-May	Eroshin	13	Alternative Investments

* 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 do not follow the readings assigned by CFA Institute. Please see page 2 for details

Dates for SS 17, 14/"12" and "12" have been rearranged.

CFASF Review Program Reading Assignment Changes 2012

Level III Study Sessions 7, 11 & 12

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 affected are as follows:

1. JANUARY 18, 2012 - COMBINED STUDY SESSION 6 & 7:

STUDY SESSION 6 – CAPITAL MARKET EXPECTATIONS IN PORTFOLIO MANAGEMENT

Reading 18: *Capital Market Expectations*

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

Reading 19: *Equity Market Valuation*

Reading 20: *Dreaming with BRICs: The Path to 2050*

Moved to SS#12

2. JANUARY 11, 2012 - STUDY SESSION 11 – EQUITY PORTFOLIO MANAGEMENT

Reading 27: *Equity Portfolio Management*

Reading 28 from Study Session 12: *Corporate Governance*

3. FEBRUARY 8, 2012 - STUDY SESSION 12 – SPECIAL ISSUES IN EQUITY PORTFOLIO MANAGEMENT

~~Reading 28: *Corporate Governance*~~

Moved to SS#11

Reading 20: from Study Session 7: *Dreaming with BRIC's – The Path to 2050*

Reading 22: from Study Session 8: *The Case for International Diversification* (This reading will be reviewed again in the SS8 class.)

Reading 29: *International Equity Benchmarks*

Reading 30: *Emerging Markets Finance*

Reading 35: from Study Session 14: *Currency Risk Management*