ASIM
Association of Solicitors and Investment Managers

Training schedule 2008 – 2009

London	Edinburgh	Topic	Who Should Attend
4 December		**Winter General Meeting**	All those providing investment services.
14 January		**Alternative investments – a training day** • Characteristics of private equity, property, hedge funds, commodities etc • Drivers of performance • Ways to invest • Role in a portfolio and how effective for diversification	All who are advising on, or managing investments, and trustees
	3 February	**Charities and their investments** • Duties as a trustee • Appropriate investment strategies • Attractions of CIFs and CDFs	All those providing investment services to charities, including trustees and investment managers.
11 February		**ICAAP (Internal Capital Adequacy Assessment Process)** • Impact of credit crunch • Improving the process	Finance directors and chief executives and all those involved in the ICAAP process.
18 March	3 June	**Key issues in financial planning for investment managers** • Pensions • Insurance policies • Taxation • Inheritance planning	Those who are new to the business or need a refresher on the key financial factors to consider when providing an investment management service.
22 April	26 March	**Choosing a collective** • Active versus passive, ETFs • Long only versus long/short funds • Performance measurement • Total expense ratios • Legal structure and tax implications	Trustees, investment managers and advisors selecting collectives.
	7 – 9 May	**Annual conference**	All those providing investment services.

17 June		**Gaining new and preserving existing business in a difficult environment** • Reviewing business strategies and how to implement them • Behavioral finance and how it help us understand investor attitudes • Making effective presentations to existing and prospective clients • Products that perform well despite poor market conditions	All involved with managing a solicitors' practice or related investment business, and particularly people who are setting marketing and business strategy, as well as those working in the marketing division.
July	September	**Keeping out of jail** • Implication of recent changes on the regulatory front • Individual versus firm responsibilities • Recent cases	All those working in investment directly with clients or in compliance functions, or having a supervisory role.
September		**Review of investment products after the turmoil - did they deliver as promised?** • Hedge funds • Structured products • ETFs and ETCs	All those providing investment advisory, investment management and trustee services to clients
October	November	**Investing trust assets** • Investment Duties under the Trustee Act • Investment Policy Statements • Monitoring and reviewing investments	Trustees and all those providing services to trustees
November		**Performance of asset classes in the downturn** • A review of performance of the major asset classes • New drivers of performance • Risk assessment • Correlation between assets	All those providing investment advisory, investment management and trustee services to clients

This schedule may be subject to change.