



Training schedule 2008 – 2009

London	Edinburgh	Topic	Who Should Attend
9 July		Constructing private client portfolios in turbulent times <ul style="list-style-type: none"> • Benchmark selection • Asset allocation • Risk management • Using alternatives to enhance performance 	Trustees, investment managers and advisors and all those who are involved in the investment process.
	September	Key tax considerations for private clients <ul style="list-style-type: none"> • Taxation of investments, income and capital gains • Advantages and disadvantages of off-shore products • Investing for non-residents and non-doms • IHT considerations when selecting investments. 	All who either instruct or are investment professionals assisting clients with financial planning and need to understand the tax implications of their advice or investment decisions. All who advise trustees on the investment of family or charitable funds.
17 September		Financial advice for investment managers – a training day <ul style="list-style-type: none"> • Key issues in financial planning • Pensions • Taxation • Inheritance planning 	Those who are new to the business or need a refresher on the key financial advice factors to consider when providing an investment management service.
15 October	November	Charities and their investments <ul style="list-style-type: none"> • Duties as a trustee • Appropriate investment strategies • Attractions of CIFs and CDFs 	All those providing investment services to charities, including trustees and investment managers.
12 November		Understanding total expenses and costs of collectives <ul style="list-style-type: none"> • Structure of fees • Offshore versus onshore funds • Impact of transaction costs • Are performance fees attractive? 	Trustees, investment managers and advisors selecting collectives, and those involved in the establishment and marketing of new investment products.
4 December		WGM	

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January	March	Investment managers as part of a seamless team <ul style="list-style-type: none"> • Client relationships • Reporting • Trustee responsibilities • Pension and tax issues 	Investment managers and advisors who wish to better understand the implications of their investment decisions on their colleagues' responsibilities.
February		Keeping out of jail <ul style="list-style-type: none"> • 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.
March	June	Gaining new business in a difficult environment <ul style="list-style-type: none"> • 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.
April		Choosing a collective <ul style="list-style-type: none"> • 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	
June	September	Investing trust assets <ul style="list-style-type: none"> • Investment Duties under the Trustee Act • Investment Policy Statements • Monitoring and reviewing investments 	Trustees and all those providing services to trustees.

This schedule may be subject to change.