



{ Private Wealth Management Conference

Investing for Private Clients: Defining the Issues

Friday, April 25, 2008

Ko'olau Golf Club

11:00 am – 12:00 pm Registration

12:00 pm – 4:45 pm Lunch & Presentation

4:45 pm – 6:30 pm Heavy pupus, no-host cocktails

SPEAKERS

Keynote Luncheon Speaker & Moderator:

Emilio Gonzalez, CFA, Chief Investment Officer, Perpetual Investments
& Chair of the Board of Governors, CFA Institute

Stephen Horan, CFA, Head, Private Wealth, CFA Institute
"A Comprehensive Approach to Private Wealth Management"

Scott D. Welch, Managing Director, Fortigent, a Lydian Company
"Hedging, Monetizing, and Reinvesting a Concentrated Stock Position"

Jeffrey E. Horvitz, Vice Chairman, Moreland Management Company
"An Introduction to Tax Aspects of Investment Management"

RSVP / PAYMENT

\$70 CFA Hawaii members / **\$95** non-members / \$125 at the door
Please prepay by Monday, **April 21st** / No refunds after April 21st

By credit card at www.cfahawaii.org

By check made payable to "CFA Hawaii"

Send to: CFA Hawaii / P.O. Box 580 / Honolulu, HI 96809

Continuing Education credits will be available for CFAs, CFPs & CPAs.

RSVP by Monday, April 21st to laurie.nakamoto@gmail.com

For more information, visit our website at www.cfahawaii.org