



Rochester University and Cygnet Institute present:

SEM102 Successful Portfolio Management

Institutional Techniques to Manage Your Investment Decisions for Retirement

Details

This course will teach you to build your overall Investment Policy Statement (IPS) so you can:

- Learn to use Modern Portfolio Theory
- Apply critical thinking to decisions
- Build a proper asset allocation
- Learn portfolio rebalancing techniques
- Demand fiduciary treatment
- Avoid traps of Behavioral Economics

Location

5:30pm – 9:00pm Wednesdays, March 13, 20, and 27
653 Union Hall
670 East Walton Blvd
Pontiac MI 48340

Sign-up

To register, go to <https://cygnetinstitute.org/financial-management-workshops/>

A minimum of 10 registered members needed for this 3-session class

Spouse may attend at no additional cost

Complimentary meal will be served

TAP Vouchers

ATTENTION UAW-GM members at 653 and 5960 who have TAP

Someone from Cygnet Institute will contact you about your TAP voucher

LAST DAY TO REGISTER March 9th

VALUE \$987.00 from Rochester University



#CFX10700