

Pediatric Anesthesiology 2015
Saturday March 14th
3:00 – 5:00 pm

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Evidence Based Investing & Financial Planning

The goal of this presentation is to arm the participants with the information they need to be informed consumers of investment advice and to achieve their financial planning goals. We will conclude the presentation with an example of how to build a diversified portfolio.

Participants will be provided with copies of Evidence Based Investing, An Anesthesiologists Guide to Investment Risk and Reward, An Anesthesiologists Guide to Wealth Preservation and The Investment Answer.

- 1) Introduction to Evidence Based Investing (10 min)
 - a) The participants will be introduced to the building blocks of evidence based investing.
- 2) Market Pricing (20 min)
 - a) Video (5 min)
 - b) Discussion (15 min)
 - i) You, the Market and the Prices You Pay
 - (1) Group Intelligence and its effect on market pricing
 - ii) Ignoring the siren song of Daily Market Pricing
 - (1) Invest according to what you can control
 - iii) Financial Gurus and other Unicorns
 - (1) They are expensive and rare
- 3) Diversification (20 min)
 - a) Video (5min)
 - b) Discussion (15min)
 - i) The Full Meal of Diversification
 - (1) Your most important ally.

- ii) Managing the Markets Risky Business
 - (1) All risks are not equal.
 - iii) Get Along, Little Market
 - (1) Smoothing out the ride with diversification
- 4) Return Factors (20 min)
- a) Video (5min)
 - b) Discussion (15min)
 - i) What Drives Market Returns?
 - (1) Compensation for providing capital
 - ii) The Essence of Evidence Based Investing
 - (1) Invest based on evidence rather than conjecture
 - iii) Factors the Figure Into and Evidence Based Portfolio
 - (1) What has the research from academia told us?
 - iv) What as Evidence Based Investing Done for Me Lately?
 - (1) The learning continues. What are the latest findings of the research.
- 5) Behavioral Influences (20 min)
- a) Video (5min)
 - b) Discussion (15min)
 - i) The Human Factor
 - (1) Perhaps the most important factor in investing
 - ii) Behavioral Biases – What Makes your Investment Brain Tick?
 - (1) Are your instincts helping or hurting you?
- 6) Pulling it all Together (10 min)
- a) How to build a diversified portfolio
- 7) Q&A (20 min)