

## Upcoming Chapter Meeting: AAI Houston



Date: Tuesday, September 10, 2013

Topic: Building a Multi-Asset Low-Correlation Portfolio

Speaker: Craig L. Israelsen, Ph. D., Associate Professor, Brigham Young University

Using historical data, Israelsen examines the growth and loss potential of various portfolios during the build-up phase (prior to retirement) and the draw-down phase (post-retirement). The presentation evaluates the impact of rebalancing over multiple time periods and specifically examines the use of “alternative asset classes” in portfolio design. Israelsen also introduces the 7Twelve Portfolio, a multi-asset balanced model.

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