

Upcoming Chapter Meeting: AAI Washington D.C. Metro



Date: Saturday, October 19, 2013

Topic: Building a Multi-Asset, Low-Correlation Portfolio

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

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

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