Portfolio
Construction
Forum

enabling better quality portfolio construction knowledge, skill and expertise for practitioners.

Portfolio Construction **Forum**

The Forum is the specialist, independent, investment continuing education, accreditation and certification service for Australian and NZ investment and wealth professionals. We provide a **curriculum** of live and on-demand content – at the heart of which is our multi-media library – **curated** for the **community** of professionals involved in constructing or giving advice on multi-asset, multi-manager portfolios. Akin to a private business school, **the Forum enables better quality portfolio construction knowledge, skill and expertise for practitioners**, to help them improve the financial wellbeing of individuals.

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OUR 5 CORE BELIEFS

1. **In a VUCA world, quality investment advice and decision-making is invaluable**
   Quality investment advice and portfolio construction materially enhance individuals' financial wellbeing

2. **Mastery of the portfolio construction cycle is critical and core**
   Quality portfolio construction requires discipline, underpinned by values, understanding, clarity, and agility

3. **A whole-brain approach to portfolio construction is key to quality decisions**
   Quality portfolio construction requires knowledge and skill in investment factors AND human factors

4. **Multi-asset, multi-manager portfolio construction is optimal for most investors**
   Quality portfolio construction incorporates identifying and blending suitable professionally managed funds

5. **A continuous thirst for quaternary education is essential**
   Quality portfolio construction demands a commitment to continuous learning and reflection

OUR DISTINCTIVES

Curriculum – focusing on five knowledge domains

Curation – delivering live, on-demand & blended learning

Community – enabling better quality practitioners

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OUR DISTINCTIVES

The Forum is unique – our focus on providing specialist, independent investment continuing education, accreditation and certification services for portfolio construction practitioners is one of a kind.

Our core beliefs and our curriculum result in our whole-brain approach to portfolio construction, setting the Forum apart. We champion the Portfolio Construction Cycle - a clear, complete and cohesive approach to multi-asset, multi-manager portfolio construction to deliver better quality investor portfolios.

And how we do what we do – the combination of our **curriculum, curation and community** – is driven by our passion to enable better quality portfolio construction knowledge, skill and expertise, to help practitioners improve the financial wellbeing of individuals.

- Graham Rich

OUR CURRICULUM – OUR WHOLE BRAIN APPROACH

Our core beliefs and our curriculum of 5 knowledge domains result in our whole-brain approach to portfolio construction implemented via the Portfolio Construction Cycle - a clear, complete and cohesive approach to multi-asset, multi-manager portfolio construction.

The Strategies Knowledge Domain – designing robust portfolio strategies to meet defined investment objectives – is core.

The Markets and Investing Knowledge Domains focus on the “investment factors” in portfolio construction:
- Determining the drivers of and outlook for the investment markets (Markets)
- Researching and identifying quality investment management solutions (Investing)

The Finology and Philosophy Knowledge Domains are focus on the “human factors” - beliefs, behaviours, and principles - in portfolio construction:
- understanding and managing beliefs and behaviours in portfolio construction (Finology)
- developing a coherent set of principles to guide portfolio construction (Philosophy)

The 5 Knowledge Domains are the pillars for building better quality investor portfolios.

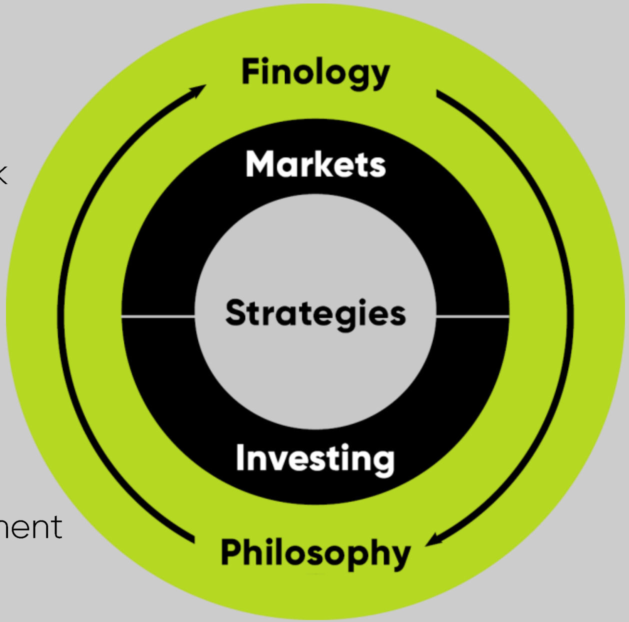
OUR 5 PORTFOLIO CONSTRUCTION KNOWLEDGE DOMAINS

- **Strategies**
  designing robust portfolio construction strategies to meet defined investment objectives

Investment Factors

- **Markets**
  determining the drivers of and outlook for the investment markets

- **Investing**
  researching and identifying quality investment management solutions



Human Factors

- **Finology**
  understanding and managing beliefs and behaviours in portfolio construction

- **Philosophy**
  developing a coherent set of principles to guide portfolio construction

CURATION – DELIVERING LIVE, ON-DEMAND, BLENDED LEARNING

We have the exceptional investment management and education knowledge, skill and competence necessary to curate quaternary education

- 1983 - Graham established Financial Planning Group, the first financial planning practice in NZ which he sold in 1987 and which continues to operate today.
- 1983 – Graham established FPG Research, the first fund research business in NZ, expanded into Australia in 1990, sold in 1999 to Morningstar. Graham left in late 2001.
- 1987 – Graham established the first financial adviser training business in Australia and NZ which he sold in 1998 and which continues to operate today
- 1996 – Deirdre joined FPG Research as head of publishing after working as an analyst in a funds management firm
- 2002 – Graham and Deirdre established Portfolio Construction Forum, the first specialist, independent investment continuing education service in Australia and NZ
- 2017 – Established Forum's specialist academic research unit, Investment Management Research Program led by industry veteran Professor Ron Bird
- 2017 – Forum is appointed as Registered Education Provider alongside Yale Business School and Chicago Booth Business School.
- 2017 – Forum is appointed as CIMA Society of Australia's Preferred Education Provider.

CURATION – DELIVERING LIVE PROGRAMS

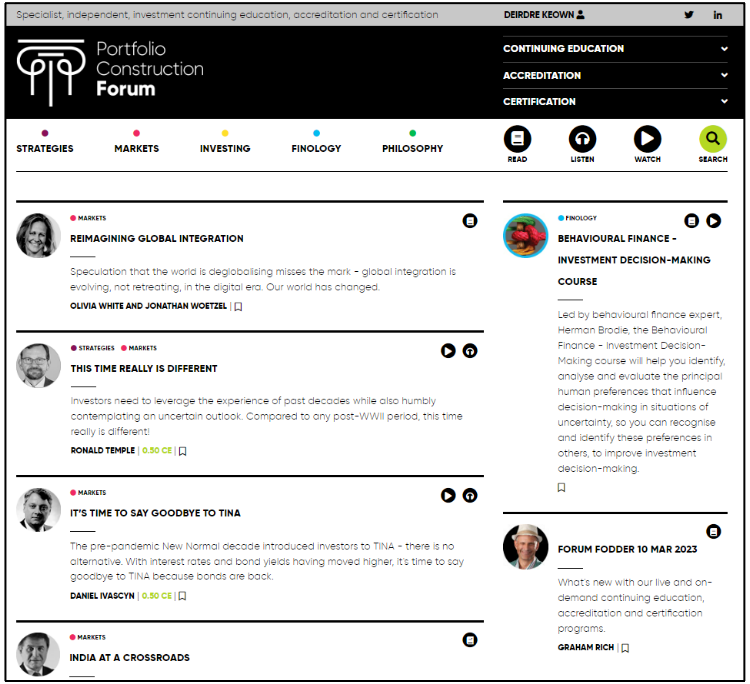
Portfolio Construction Forum presents **three live open-invitation, hybrid programs** each year, complemented by **two live, select invitation programs**.

For detail about each, see Appendix 1 – Our Continuing Education Programs.

OUR CURATION – DELIVERING ON-DEMAND CONTENT AND TOOLS

portfolioconstructionforum,edu.au is the heart of the Forum and the repository for all of our curated content. It is a unique 24/7 multi-media library. It includes over 3,500 diverse portfolio construction **perspectives** – papers and presentations (videos and podcasts) from our own live programs as well as separately curated exclusive content – available on-demand to read, listen to or watch – most with CE accreditation and related CE quizzes.

Plus our library includes on-demand certificate **courses**, **subscriptions** and **tools** where members access their "My" dashboard including their MyCE learning activity bank, MyDetails, MySaved, MyStudyPlan, MyCESubmissions, MyFBI.



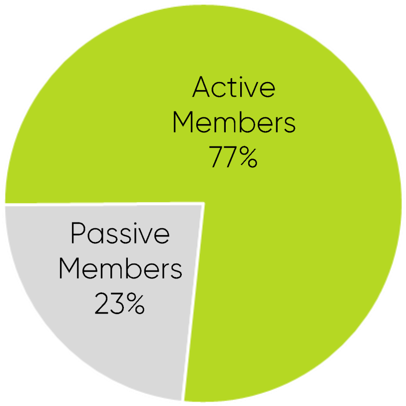
OUR COMMUNITY – 14,000+ MEMBERS

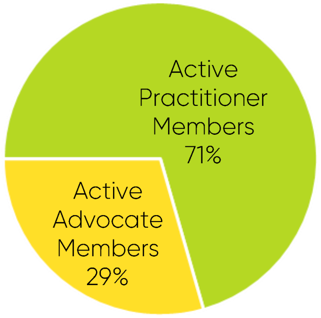
Our core focus is on creating a community of **Australian and NZ investment and wealth management professionals involved in constructing or giving advice on multi-asset, multi-manager portfolios** working in a investment advisory, funds research, investment consulting, family office, funds management, superannuation, private fund, endowment fund or investment platform business.

We call them portfolio construction Practitioners. Our community encompasses **institutional and wholesale practitioners**, and our continuing education, accreditation and certification services are designed accordingly.

We also recognise and respect the invaluable role of Advocates by whom we mean those offering products and services to Practitioners.

To retain our focus on Practitioners, we tightly manage to a 4:1 ratio of Practitioners to Advocates





CIMA Society

Certified Investment Management Analyst® Society of Australia

IN PARTNERSHIP WITH

Portfolio Construction **Forum**

The professional community for investment management analysts in Australia and New Zealand

an affiliate of **INVESTMENTS & WEALTH INSTITUTE**

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