INSTITUTE OF CORPORATE DIRECTORS

Better Directors. Better Boards. Better Business.

The Prudent Investor Rule

Institute of Corporate Directors, Edmonton Chapter

Breakfast Session – November 21, 2011

Since 2002, Trustees in the Province of Alberta are subject to the Prudent Investor Rule which is applicable to corporations, pensions, not-for profits, endowments, foundations, spousal trusts, family trusts, etc. The Prudent Investor Rule is the legal application of Modern Portfolio Theory and is based on the concept of efficient diversification. This presentation will explore:

- The application of the Prudent Investor Rule & Modern Portfolio Theory
- Understanding risks and avoiding liability through prudent investment policies
- Case law, court decisions, and the implications for Trustees

Presented By: Chris Turnbull

Biography: Christopher Turnbull, *BA (econ.), CFP, CFA, Private Wealth Counsellor*
Chris Turnbull has spent the last 20 years advising high net worth families on effective portfolio management strategies and financial planning opportunities. He has written about topics such as the Prudent Investor Rule and he has presented to national law firms, the Society of Trust and Estate Practitioners (STEP) and the Canadian Bar, Wills and Estates section. Mr. Turnbull holds a Bachelor of Arts degree specializing in Economics from the University of Alberta as well as the Certified Financial Planner (CFP) and Chartered Financial Analyst (CFA) designations.

Corporate Profile: Pavilion Investment House
Pavilion Investment House is an international wealth management boutique servicing the needs of discerning, affluent individuals, families and small institutions. Pavilion Investment House unites financial science with the practical experience of seasoned wealth managers. Drawing from the accumulated research of leading academics in the field of finance, portfolios are constructed in a non-predictive fashion with a strong recognition of market efficiency, a requirement for diversification, a focus on cost management along with integrated financial planning. Pavilion Investment House - Edmonton is located in the historic LeMarchand Mansion. Advisory services begin at $1million.

Date
Monday, November 21, 2011

Time
Breakfast - 7:00 a.m.
Session - 7:15 a.m. to 9:00 a.m.

Location
Royal Mayfair Golf Club
9450 Groat Road, Edmonton, AB

Cost
Members: $65.00 plus GST
Non-Members: $95.00 plus GST

Registration
Register online at www.icd.ca

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