

# An introduction to investment for trustees.

## *First Steps*



## Aims

This long-running seminar is designed to give a general introduction to investment. It aims to give an insight into the duties and responsibilities of a trustee and how best to fulfil these effectively, efficiently and in tune with regulatory requirements.

A summary of what we will cover on the day is shown opposite. If you would like any further information about the seminars we offer, your Client Relationship Manager would be happy to help.

*This seminar is free of charge and takes place at our offices.*

## Date

**Wednesday 6 November 2013**

## How to book

To book your place please complete the attached reply card and return it to

**Sasha Powell at UBS Global Asset Management.**

You can call Sasha on 020 7901 5160 with any queries.

Confirmation and a venue location map will be sent to all attendees approximately two weeks before each seminar.

## Second Steps

This seminar builds on the basic investment areas covered in First Steps. A separate leaflet is available with more details of Second Steps.

## Programme

- 09.30 - 09.45 Registration & coffee
- 09.45 - 10.00 Welcome & Introduction
- 10.00 - 11.00 Role of the Trustee
  - Liabilities
  - Assets
  - Funding ratio
- 11.00 - 11.15 Coffee
- 11.15 - 12.15 Meeting the governance challenge
- 12.15 - 13.30 Lunch
- 13.30 - 13.45 Quiz
- 13.45 - 14.15 Equities
- 14.15 - 14.45 Bonds
- 14.45 - 15.15 Alternatives
- 15.15 - 15.30 Summary

*Please note, this programme may be subject to change.*

**Booking Form**

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Name

Job title

Organisation

Address for confirmation details

Contact no.

Email address

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Name

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Organisation

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Contact no.

Email address

**Please scan this card and email to [sasha.powell@ubs.com](mailto:sasha.powell@ubs.com)**

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