

# Investing to meet your liabilities.

## *Second Steps*



## **Aims**

This long-running seminar builds on the basic investment areas covered in First Steps. It aims to give a deeper insight into the challenges facing trustees and possible investment solutions.

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 27 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.

## **First Steps**

We also run a First Steps seminar which provides an introduction to investment management. A separate leaflet is available with more details.

## **Programme**

- 09.30 - 09.45 Registration & coffee
- 09.45 - 10.00 Welcome & Introduction
- 10.00 - 10.15 Investment basics – a recap
- 10.15 - 11.00 Asset allocation
- 11.00 - 11.15 Coffee
- 11.15 - 12.15 Managing your portfolio
- 12.15 - 13.30 Lunch
- 13.30 - 13.45 Quiz
- 13.45 - 14.30 Risks facing Pension Schemes
- 14.30 - 15.15 Topical thinking / Insights
- 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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Contact no.

Email address

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

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