

Creighton University CFA® Boot Camp 2012

Four-Day Intensive Review Program



Creighton University is excited to offer our 3rd annual, intensive four-day boot camp for all three levels of the CFA® curriculum. This program will be offered three weeks before exam day and is the ideal supplement to weekly review courses or self-study preparation.

When: Level III: Thursday, May 10, through Sunday, May 13

Level II: Wednesday, May 9, through Saturday, May 12 (please note change in dates)

Level I: Thursday, May 10, through Sunday, May 13

Where: Creighton University, College of Business, Omaha, Nebraska 68178

Schedule: Sessions will run each day from 8:30 AM to 6:30 PM, including three breaks and lunch

Why you should come to Omaha?

We have been delivering a high-quality review experience for local candidates for nearly a decade. In an effort to support the needs of candidates from outside of Omaha, we are offering a condensed 4-day Boot Camp to review the most crucial material for your upcoming June CFA® exam. While we can't guarantee that by attending our review sessions you will pass the exam, we are confident, based on our experience and knowledge of the material, that we can help you be more prepared.

Our team:

Our knowledgeable team of instructors has decades of experience in delivering CFA® review education in Omaha, other venues in the United States, and multiple international markets. Our experience and knowledge of the curriculum make us well-suited to tailor this condensed review training to suit your needs.

Cost:

The price of this review session is \$699 for Creighton students or students enrolled in the 2011 Spring Creighton Review Course in Omaha. The cost is \$799 for all other candidates. This includes refreshments during breaks plus a Kaplan/Schweser *Mind Map* slide pack.

Benefits of our program:

We have put together a program with renowned instructors at a very reasonable price. Our unique program is offered either Wednesday through Saturday or Thursday through Sunday. This schedule is designed so that you will not miss a full week of work to attend our program.

Questions? Contact Mr. Marc LeFebvre, CFA
at mlefebvre@creighton.edu or Cari Cloyed at
caricloyed@creighton.edu or call 402.280.2612

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CFA® Boot Camp Instructors

Creighton University

Marc LeFebvre, CFA

Mr. LeFebvre is an instructor of finance at Creighton University where he teaches graduate courses in Financial Statement Analysis, Equity Analysis and Portfolio Management. Prior to joining Creighton, Mr. LeFebvre was a portfolio manager for RBC Dain Rauscher, a VP and senior portfolio manager in the Investment Management Group of the Chase Bank of Texas and he managed a \$1.0 billion pension fund for a public corporation. He holds a BA, cum laude, in economics from the University of Colorado and a MS in finance from Boston College. He has been a CFA charter holder since 1994 and has previously been an instructor at CFA review courses in Dallas, Des Moines, Omaha, Minneapolis, London, Zurich, Milan, Shanghai, and Johannesburg, specializing in financial statement analysis, equity valuation and portfolio management. He has taught in all three levels of Creighton's CFA review programs since their inception.



John A. Harris, CFA, CPA



John has more than 20 years of experience in credit and financial management, with particular emphasis in the areas of commercial loan valuation and asset recovery. In addition to his accounting practice, John operates Financial Accounting Workshops, a provider of accounting education and training to business professionals. John earned both an MBA and MS from the University of North Texas and a BBA from Texas Tech University. John has lectured for Boston University, Credit Suisse, the CFA Society of Dallas/Fort Worth, the Dallas Morning News, the German CFA Society, Goldman Sachs, the Houston Society of Financial Analysts, the Italian CFA Society, Lehman Brothers, Morgan Stanley, the CFA Society of the Netherlands, Northern Trust, Schweser Study Program, the South Africa CFA Society, the Swiss CFA Society, Texas Woman's University, the United Kingdom Society of Investment Professionals, and the University of Texas at Arlington Center.

Ken Washer, DBA, CFA, CPA, CFP®

Dr. Washer is an associate professor of finance and has been at Creighton University since 2008. He earned his graduate degrees at Louisiana Tech University and has taught at Morehead State University and Texas A&M-Commerce. He has published articles in journals including Applied Financial Economics, The Journal of Banking and Finance, The CPA Journal, and Financial Planning and Counseling. Dr. Washer lives in Omaha with his wife and two daughters. Dr. Washer joined Creighton University in 2008 as an Associate Professor of Finance. He teaches Quantitative Analysis and Portfolio Management in Creighton's MSAPM program and review programs.



Randy D. Jorgensen, Ph.D. CFA



Dr. Jorgensen is an Associate Professor of finance and Director of the Master of Security Analysis and Portfolio Management program at Creighton University. Dr. Jorgensen has taught classes in all three of Creighton's CFA review courses over the past six years. His teaching in the MSAPM program includes fixed income, derivatives, quantitative analysis, portfolio management, and ethics. He has published a number of articles in various refereed academic and professional journals. Dr. Jorgensen received his Ph.D. from the University of Missouri in 1994 and earned his CFA designation in 2004. Prior to his career in academics, he was a bank examiner and a commercial loan officer.

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CFA® Boot Camp 2012 Information

Hotel Information: Our program will be held at Creighton University, which is located near downtown Omaha and within walking distance of multiple restaurants and hotels. We have negotiated special hotel rates for you during your stay in Omaha at multiple hotels within five minutes from campus. Just mention the “Creighton rate” when making your reservation:

Hotel Name:	Embassy Suites	Fairfield Inn	Hampton Inn	Best Western
Address:	555 S. 10th St. Omaha, NE 68102	1501 Nicholas St. Omaha, NE 68102	1212 Cuming St. Omaha, NE 68102	330 N. 30th St. Omaha, NE 68131
Phone:	402.346.9000	402.280.1516	402.345.5500	402.345.2222
Est. Rate:	\$135-\$145	\$99-\$109	\$94-\$109	\$69
Free Breakfast:	x	x	x	x
Pool:	x	x	x	
Free Internet:	\$10.95/day	x	x	x
Airport Shuttle:	x	x	x	x
Campus Shuttle:	x	x	x	x

Airfare Information: Omaha’s Eppley Airport (OMA) is located just 10 minutes from the Creighton University campus. Here are a few sample flights:

Round-trip from:	Cost:
Chicago (Midway)	\$223
Minneapolis-St. Paul	\$342
San Francisco	\$484
Dallas	\$335

Testimonials from 2011 Review:

“Exceptional across the board, the instructors really know their stuff, invaluable experience.”

“Provided relevant, useful information and tips for success on the exam.”

“Instruction was succinct, helpful, knew material inside and out and very motivated.”

“Saturday night Level III review was awesome.”

“Best in the business - enough said.”

Reserve your place today!

Fill out and return the reservation sheet on the next page
or visit our website to complete an e-registration at:

www.creighton.edu/business/cu-boot-camp

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RSVP for Creighton CFA® Boot Camp

Please register no later than May 1, 2012

Enrollment as non-Creighton student \$799

Enrollment as Creighton/Spring 2012 CFA Review student \$699

If you wish to pay using a credit card, do not complete this form. Instead, please go to www.creighton.edu/business/CUbootcamp where you can pay and complete an online registration. If you wish to pay with check, complete this form and mail it to the address below. Make checks payable to **Creighton University**.

Exam (choose one): Level 1 _____ Level 2 _____ Level 3 _____

Name _____

Title _____

Company _____

Phone _____

Email _____

Street _____

City/state _____ Zip _____

Please return this form along with your check to:

Marc LeFebvre
Creighton University - CoBA 433
CU Boot Camp
2500 California Plaza
Omaha, NE 68178

Questions? Contact Marc LeFebvre at mlefebvre@creighton.edu
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4-Day Boot Camp Schedule

CFA® Exam Level I Exam Preparation

Minor adjustments to the initial time blocks by the instructor should be expected. 15-minute breaks are scheduled at approximately 10:15 AM, 3:15 PM and 5:15 PM. 75-minute lunch breaks are scheduled for 12:15 PM. Lunch is not provided, though snacks and beverages will be available during the 15-minute breaks. Promptness is appreciated.

Time	Topic	Study	Instructor
THURSDAY, MAY 10 2012			
8:30 - 10:15	Financial Reporting and Analysis: Inventories, Long-Term Assets, Deferred Taxes, and On-and Off-Balance Sheet Debt	9	Harris
10:30 - 12:15	Financial Reporting and Analysis: Applications and International Standards Convergence	10	Harris
1:30 - 3:15	Corporate Finance	11	Harris
3:30 - 5:15	Derivative Investments	17	Harris
5:30 - 6:30	Alternative Investments	18	Harris
FRIDAY, MAY 11, 2012			
8:30 - 10:15	Financial Reporting and Analysis: An Introduction	7	Harris
10:30 - 12:15	Financial Reporting and Analysis: An Introduction; and The Income Statement, Balance Sheet, and Cash Flow Statement	7,8	Harris
1:30 - 3:15	Financial Reporting and Analysis: The Income Statement, Balance Sheet, and Cash Flow Statement	8	Harris
3:30 - 5:15	Financial Reporting and Analysis: Inventories, Long-Term Assets, Deferred Taxes, and On-and Off-Balance Sheet Debt	9	Harris
5:30 - 6:30	Financial Reporting and Analysis: Inventories, Long-Term Assets, Deferred Taxes, and On-and Off-Balance Sheet Debt	9	Harris
SATURDAY, MAY 12, 2012			
		Session	
8:30 - 10:15	Fixed Income: Basic Concepts	15	Jorgensen
10:30 - 12:15	Fixed Income: Analysis and Valuation	16	Jorgensen
1:30 - 3:15	Quantitative Methods: Basic Concepts	2	Washer
3:30 - 5:15	Quantitative Methods: Basic Concepts and Application	2,3	Washer
5:30 - 6:30	Quantitative Methods: Application	3	Washer
SUNDAY, MAY 13, 2012			
8:30 - 10:15	Equity: Industry and Company Analysis	14	Washer
10:30 - 12:15	Economics: Microeconomic Analysis; and Market Structure & Macroeconomic Analysis	4,5	Washer
1:30 - 3:15	Economics: Market Structure & Macroeconomic Analysis; and Monetary & Fiscal Economics	5,6	Washer
3:30 - 5:15	Equity: Securities Markets	13	Washer
5:30 - 6:30	Portfolio Management	12	Jorgensen

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4-Day Boot Camp Schedule

CFA® Exam Level II Exam Preparation

Minor adjustments to the initial time blocks by the instructor should be expected. 15-minute breaks are scheduled at approximately 10:15 AM, 3:15 PM, and 5:15 PM. 75-minute lunch breaks are scheduled for 12:15 PM. Lunch is not provided, though beverages will be available during the 15-minute breaks. Promptness is appreciated.

Time	Topic	Study Session	Instructor
WEDNESDAY, MAY 9, 2012			
8:30 - 10:15	Valuation Concepts and Industry & Company Valuation	10,11	LeFebvre
10:30 - 12:15	Industry & Company Valuation and Valuation Models	11,12	LeFebvre
1:30 - 3:15	Valuation Models	12	LeFebvre
3:30 - 5:15	Valuation Models and Alternative Investments	12,13	LeFebvre
5:30 - 6:30	Alternative Investments	13	LeFebvre
THURSDAY, MAY 10, 2012			
8:30 - 10:15	Quantitative Methods: Quantitative Methods for Valuation	3	Washer
10:30 - 12:15	Quantitative Methods: Quantitative Methods for Valuation	3	Washer
1:30 - 3:15	Fixed Income: Valuation Concepts	14	Jorgensen
3:30 - 5:15	Corporate Finance and Financing & Control Issues	8, 9	Jorgensen
5:30 - 6:30	Capital Market Theory and the Portfolio Management Process	18	Jorgensen
FRIDAY, MAY 11, 2012			
8:30 - 10:15	Economics for Valuation	4	Washer
10:30 - 12:15	Quantitative Methods for Valuation	3	Washer
1:30 - 3:15	Fixed Income: Structured Securities	15	Jorgensen
3:30 - 5:15	Derivative Investments: Forwards & Futures	16	Jorgensen
5:30 - 6:30	Derivative Investments: Options, Swaps and Interest Rate and Credit Derivatives	17	Jorgensen
SATURDAY, MAY 12, 2012			
8:30 - 10:15	Financial Reporting and Analysis: Intercorporate Investments	5	Harris
10:30 - 12:15	Financial Reporting and Analysis: Intercorporate Investments	5	Harris
1:30 - 3:15	Financial Reporting and Analysis: Post-Employment & Share-Based Compensation & Multinational Operations	6	Harris
3:30 - 5:15	Financial Reporting and Analysis: Earnings Quality Issues and Financial Ration Analysis	7	Harris
5:30 - 6:30	Portfolio Management	5,6,7	Jorgensen

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4-Day Boot Camp Schedule

CFA® Exam Level III Exam Preparation

Minor adjustments to the initial time blocks by the instructor should be expected. 15-minute breaks are scheduled at approximately 10:15 AM, 3:15 PM, and 5:15 PM. 75-minute lunch breaks are scheduled for 12:15 PM. Lunch is not provided, though beverages will be available during the 15-minute breaks. Promptness is appreciated.

Time	Topic	Study Session	Instructor
THURSDAY, MAY 10, 2012			
8:30 - 10:15	Behavioral Finance	3	LeFebvre
10:30 - 12:15	Private Wealth Management	4	LeFebvre
1:30 - 3:15	Private Wealth Management	4	LeFebvre
3:30 - 5:15	Portfolio Management for Institutional Investors	5	LeFebvre
5:30 - 6:30	Portfolio Management for Institutional Investors	5	LeFebvre
FRIDAY, MAY 11, 2012			
8:30 - 10:15	Capital Market Expectations in Portfolio Management and Economic Concepts For Asset Valuation in Portfolio Management	6,7	LeFebvre
10:30 - 12:15	Asset Allocation	8	LeFebvre
1:30 - 3:15	Management of Passive and Active Fixed Income Portfolios	9	LeFebvre
3:30 - 5:15	Management of Passive and Active Fixed Income Portfolios	9	LeFebvre
5:30 - 6:30	Portfolio Management of Global Bonds and Fixed Income Derivatives	10	LeFebvre
7:00 - 9:00	IPS Review		LeFebvre
SATURDAY, MAY 12, 2012			
8:30 - 10:15	Portfolio Management of Global Bonds and Fixed Income Derivatives	10	LeFebvre
10:30 - 12:15	Equity Portfolio Management	11, 12	LeFebvre
1:30 - 3:15	Alternative Investments	13	LeFebvre
3:30 - 5:15	Risk Management	14	LeFebvre
5:30 - 6:30	Risk Management Applications of Derivatives	15	LeFebvre
7:00 - 9:00	Essay Workshop		LeFebvre
SUNDAY, MAY 13, 2012			
8:30 - 10:15	Risk Management Applications of Derivatives	15	LeFebvre
10:30 - 12:15	Execution of Portfolio Decisions; Monitoring and Rebalancing	16	LeFebvre
1:30 - 3:15	Performance Evaluation and Attribution	17	LeFebvre
3:30 - 4:45	Performance Evaluation and Attribution	17	LeFebvre

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