April 27, 2016 Strategic Value Investing Stephen Horan

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This session will cover value investing and long term portfolio strategy. It will focus on working with private wealth clients and on how to adhere to strategy regardless of emotions or popular sentiment. Stephen will review techniques taken from his book, Strategic Value Investing: Practical Techniques of Leading Value Investors.

Praise for Strategic Value Investing:
"A book that has much the same character as a good value investor: calm, disciplined, with a grasp both of broad theory and of how to apply it."
JOHN AUTHERS, senior investment columnist, Financial Times

"This comprehensive look at valuation techniques is not only insightful, but can be easily put to use by individual and professional investors alike."
CHARLES ROTBLUT, CFA, Vice President, the American Association of Individual Investors

"Offers a sound fundamental perspective for those looking to deepen their analysis around stocks. A great resource for all types of value investors."
HEATHER BRILLIANT, CFA, global head of equity research at Morningstar and member of the CFA Institute Board of Governors

"This book is of Real Value! It updates the pioneering work of Ben Graham and Phillip Fisher, blending the valuation techniques of the masters (such as Warren Buffett) and provides institutional and individual investors the A to Z of value investing from a practitioner perspective."
JOHN MAGINN, CFA, EVP & CIO, Mutual of Omaha (retired) and coeditor of Managing Investment Portfolios

"An actionable road map for implementing a disciplined value investing strategy. Very much in the Ben Graham style. The sophisticated individual investor will find this comprehensive digest a continual and timeless reference."
WALLACE FORBES, CFA, President of Forbes Investors Advisory Institute, Division of Forbes magazine

"Many books propose to help you learn how to become a better value investor. This one, which is bound to become a staple of every value investor's library, delivers on its promise."
ROBERT POWELL, editor of Retirement Weekly and columnist of "MarketWatch"

Stephen Horan brings to the table a unique combination of industry and academic experience. In industry, he has served as an expert witness in support of securities litigation, a forensic economist in private practice preparing economic impact studies, a principal of a financial advisory firm, a financial analyst, and as a buy-side account manager and sell-side stockbroker. In academia, Horan served as a professor of finance at and is a recognized researcher in wealth management, tax efficient investing, and derivatives. In his current position, Horan leads the development of CFA Institute’s education programs, including the globally recognized CFA Program, and publications

The author or co-author of several books, including The New Wealth Management: A Financial Advisers Guide to Managing and Investing Client
Stephen Horan, PhD, CFA, CIPM
Managing Director, Credentialing at CFA Institute

Horan has also edited the volume Private Wealth: Wealth Management in Practice. His articles have appeared in peer-reviewed journals, such as the Financial Analysts Journal, Harvard Business Review Latin America, Journal of Financial Research, Journal of Wealth Management, and Financial Services Review. He has received numerous research grants, including the 2012 Graham and Dodd Readers’ Choice Award.

Horan currently serves on the editorial board of the Journal of Wealth Management and the Financial Services Review. Before joining CFA Institute, he was active both locally and nationally with CFA Institute, drafting monographs, serving as a consultant to the Financial Accounting Policy Committee, and as Education chair for the CFA Society of Buffalo. He has been a frequent invited speaker at professional, academic, and CFA Institute events.

Horan earned a Ph.D. in Finance at the State University of New York/Buffalo and a BBA degree in Finance at St. Bonaventure University.

CFA Society South Florida has determined that this program qualifies for 1.5 CE credit hour(s), including 0 hour(s) in the content areas of Standards, Ethics, and Regulations (SER), under the guidelines of the CFA Institute Continuing Education Program. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE tracking tool.