
SAHTU TRUST INVESTMENT WORKSHOP

NORMAN WELLS, NT

JUNE 2-3, 2010

There will be a Sahtu Trust workshop starting Wednesday June 2, 2010 at 1:00 pm and continues to the next day, June 3, 2010 @ the legion.

June 2 (1:00-5:00)

Introduction to Investments

Overview of Fund Performance (HS)

Realized and Unrealized Gains (HS)

Bonds

- What is a bond? (HS)
- Investing in bonds (HS)
- Beutel Goodman bond management (JE)
- Jones Heward bond management (GW)

Stocks

- What is a stock? (HS)
- Investing in stocks (HS)
- Beutel Goodman stock management (JE)
- Jones Heward stock management (GW)

Asset mix

- Selecting an asset mix (HS)
- Investment policy asset mix and tactical asset mix (HS)
- Implementation of international equities (HS)
- Beutel Goodman asset mix management (JE)
- Jones Heward asset mix management (GW)

June 3 (9:30-noon)

Sahtu Trust Investment Performance

Overview of Fund Structure (HS)

- Choice of asset classes
- Asset mix
- Investment Policy Portfolio
- Active and index investment management
- Selection of investment managers

Evaluating investment managers (HS)

Fund Performance (HS)

Jones Heward review of investment management (GW)

Beutel Goodman review of investment management (JE)

June 3 (noon-2:00)

Face-to-face meetings with community representatives

HS= Harry Satanove (Satanove & Flood Consulting)

JE = Jim Edwards (Beutel Goodman)

GW = Geoff Waters (Jones Heward)

For more information you can contact us, our information is listed below.



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