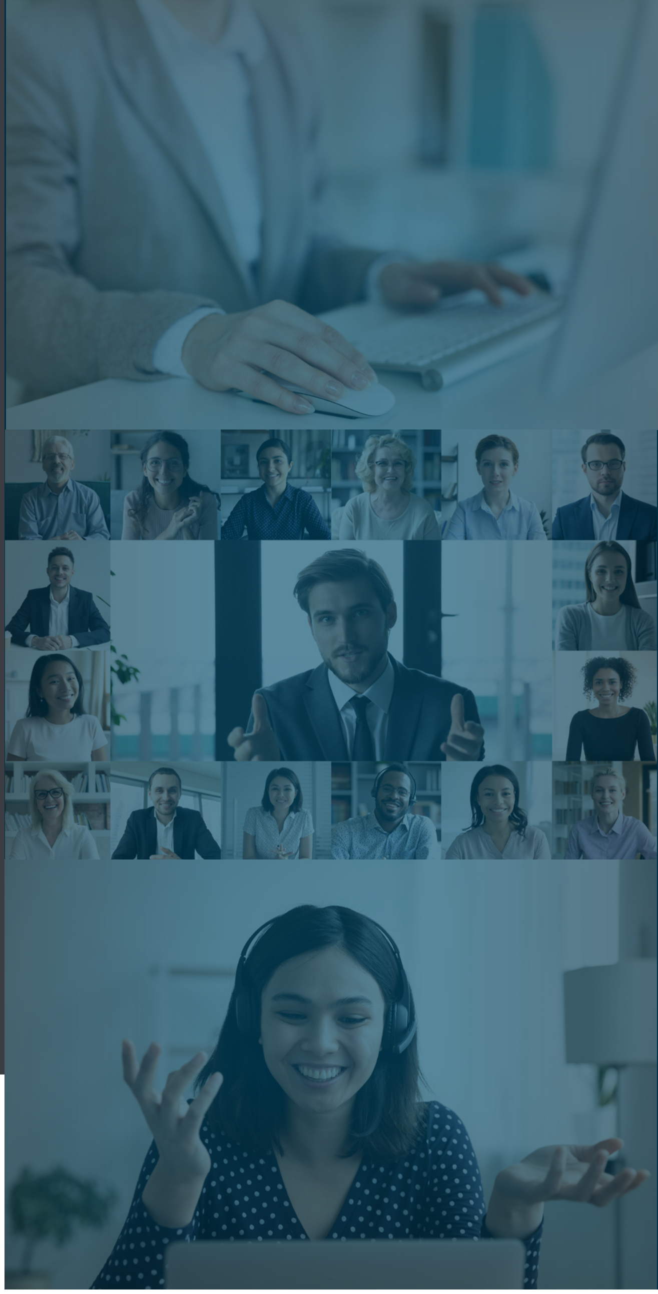
Room151

CCLA
GOOD INVESTMENT

A practical guide to investing



CPD-certified series of six tutorials for council treasurers and administering authorities of the LGPS

30 minute presentations followed by 15 minutes of Q&A

An understanding of investment markets is increasingly a necessity for local authority investors. Too often however investment concepts are cloaked behind a jargon that can be hard to translate into memorable ideas.

This series of CPD-certified tutorials is designed to take away the mystery, decode the jargon, and explain in an accessible way the key concepts and practices you need to be familiar with.

Over a series of six presentations, we will consider the factors which will help you determine the investment strategies which are right for you.

We will examine the characteristics of the major asset classes and see how to combine them in ways which meet your objectives and optimise the balance of risk and return. We will look at where costs come from, those you see and those you don't, and the different sources of return available.

We will also show you how to decide which investment route is the right choice to meet your needs. Finally, we will consider ethical and responsible investment, a growing presence for local authority investors and an approach which, done correctly, can improve performance and protect reputations.

Here's a snapshot of the programme. Each session is split into 1 x 30 mins presentation followed by 1 x 15 mins Q&A. You are welcome to attend all or some of the sessions depending on your interests and what suits you. The whole series is free to attend for local government finance officers working in treasury and/or pensions, s151 officers and finance portfolio holders.

CURRICULUM

#1: Tuesday, February 16th - 11:30-12:15
The benefits of investing for the longer term
Understanding risk and the impact on real values of inflation over time.

#2: Tuesday, February 23rd - 11:30-12:15
A guide to the major asset classes
Each has its own characteristics which will dominate their behaviour. Understanding the importance of asset choice in portfolio construction is paramount.

#3: Tuesday, March 2nd – 11:30-12:15
How to build a portfolio to meet your requirements
Risk and return dynamics and the importance of diversification.

#4: Tuesday, March 9th – 11:30-12:15
Costs and charges and the different types of investment returns
Understand how your money is put to work and what the true costs are to investors

#5: Tuesday, March 16th – 11:30-12:15
Practical investment choices
Understanding direct investment v funds, active v passive & key questions when reviewing funds

#6: Tuesday, March 23rd – 11:30-12:15
ESG & responsible investment
Investing with good intentions & making sure that your portfolio reflects your beliefs.

We do hope that you find our programme interesting and look forward to welcoming you on the day.

4.5 CPD hours

Who should attend?

Local government:

Treasury managers

Principal accountants

investment officers (treasury and LGPS)

Finance portfolio holders

LGPS investment committee members

Section 151 officers and/ or deputies

Other interest finance officers with investment oversight/responsibility

Presenters include...

Amy Browne
stewardship lead
CCLA

John Kelly
director – client investment
CCLA

Heather Lamont
director – client investment
CCLA

REGISTER HERE for all six sessions and attend as much as you can

- Any sessions you miss will be available on catch-up at the Room151 webcast channel
- Any questions please contact phillipe.stankovski@room151.co.uk