

# Finding Alpha in Crisis: How the Experts Are Investing Now

## Part VI: Asset Allocation Now: Rethinking Portfolio Construction

3:00 PM ET | Wednesday, July 1, 2009

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# Today's Panel

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- Panelists



- Roger Gibson, CFA, CFP

- Founder and Chief Investment Officer of Gibson Capital
    - Author of the best-selling book: *Asset Allocation: Balancing Financial Risk*



- Ben Warwick

- Chief investment officer of Sovereign Wealth Management
    - Founder of Quantitative Equity Strategies, LLC.
    - Author of: *Searching for Alpha: The Quest for Exceptional Investment Performance; The Handbook of Managed Futures; and The Worldly Investor Guide to Beating the Market: Beat the Pros at Their Own Game*



- Moderator

- Kate McBride

- Editor-in-Chief, *Wealth Manager*

# Rethinking Portfolio Construction

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- After the past two years of market and economic crisis, how has portfolio construction and asset allocation changed? Is Modern Portfolio Theory dead? What about the efficient market theory or regression to the mean?
  - How is your firm re-positioning clients to help them get back on track for the recovery?
  - Classic investment theories can work again in the recovery from the crisis—and if so, how?
  - How has the current market and economic situation changed the way you allocate assets for clients?
  - Risk and reward in the current climate and going forward—which risks are worth taking and which may not be?

Today's session will be a teleconference featuring a roundtable discussion between the panelists.

# Q&A

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Webinar participants may send questions via GoToWebinar at any time. We will ask our panelists to address those questions as time allows.



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# Continuing the Dialogue

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- Sign up for Ben Warwick's Searching for Alpha e-newsletter at [InvestmentAdvisor.com](http://InvestmentAdvisor.com), and read his Consider the Alternatives column at [WealthManagerWeb.com](http://WealthManagerWeb.com)
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