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INVESTMENT MANAGEMENT
ASSOCIATION OF SINGAPORE

Leadership and Culture in the Investment Firm: Measuring and Managing them for Success

Venue: Capital Tower, 168 Robinson Road
FTSE Room, Level 9
Date: 24 February 2010
Time: 2pm to 6pm
By: Mr Jim Ware, CFA

Overview

In this workshop, Jim Ware shows how top investment firms use metrics to manage important success factors like leadership, culture, and teamwork. It is designed to provide the latest ideas and tools for leveraging the talent in your investment organization. Led by a recognized expert and author on leadership, culture and teamwork in the investment industry, the workshop is lively and interactive, using real-time data collection from the participants on topics like compensation, succession planning, and retention of talent. Mr. Ware's experience with hundreds of investment firms around the world provides a unique perspective on best practices and current issues in the industry.



As a participant in the CFA Institute Approved-Provider Program, CFA Singapore has determined that this event qualifies for 3.5 credit hours. If you are a CFA Institute member, CE credit for your attendance at this event will be automatically recorded in your CE diary.

Refer to next page for more information

Workshop Deliverables

Workshop deliverables: -

- Defining leadership and culture in the investment firm.
- What is different about running an investment firm?
- How do you leverage talent in an investment team?
- What are the best practices of top investment teams?
- What are the common elements of successful investment cultures?
- How do you build a culture of accountability?
- What is a meritocracy and why is it so important to investment performance?
- What are effective ways to measure intangibles like leadership, culture, and teamwork?
- Best practices of the top teams: what are the metrics they use?
- The Power of Measurement: what you can measure, you can manage.

Participants will learn the tools used by Focus Consulting Group in their worldwide practice with investment firms. Through the use of real-time voting devices, the attendees can see their own responses to important questions used in assessments.

Refer to next page for Speaker's Bio

Speaker's Biography



Jim Ware is the founder of Focus Consulting Group, a firm that advises investment leaders on leveraging their talent. He has written three books on leadership and culture in the investment industry, all in the Wiley Financial Series. The most recent book is entitled, "High Performing Investment Teams," (February, 2006).

Mr. Ware is a Chartered Financial Analyst with 20 years experience as a research analyst, portfolio manager and director of buy-side investment operations. He has taught investments at the Kellogg Graduate School of Management and written articles for various trade publications including the Financial Analysts Journal. He is on the advisory staff for Institutional Investor magazine and the CFA Board of Regents. His books have been reviewed in The Wall Street Journal, Pensions & Investments, Forbes, and Canada's Globe and Mail. He has presented at over 100 CFA events in 18 countries and writes a quarterly column for their website: "Firm Success: Leading the Investment Firm." Jim has appeared on Fox News, Canada's "Report on Business" and other news shows.

His educational background includes a Masters in Business from the University of Chicago and a degree in philosophy from Williams College, where he graduated Phi Beta Kappa.

Refer to next page for Speaker's Bio

Jim Ware's Workshop Reservation Form

Complete this form and fax to 6323-7657 or email to programs@cfasingapore.org

Advanced reservation is required due to limited capacity

For participation, please complete the fields below and fax back to CFA Singapore

Please indicate membership ID to enjoy members' rate

Alternatively, Reservation can be made via email

Refund and Cancellation Policy:

***Refunds and cancelation received on the following:**

***2 weeks before the workshop date: 50% Cancellation Fee**

***1 week before the workshop date: No Refund**

***Members/Guests without registration will NOT be admitted**

***Admission/Seats are subject to availability**

Name: Mr./Mrs./Ms./Dr./ _____

CFA Singapore/IMAS Membership No.: _____ Email: _____

Tel: _____ Fax: _____

Company: _____

Address: _____

_____ Postal Code: _____

Please indicate the applicable category	Standard Fees
Members	S\$450
Non-members	S\$650

(Bank, *Cheque No.): _____ Amt Due: S\$ _____

*All cheques to be made payable to 'CFA Singapore'

c/o 10 Shenton Way #13-02 MAS Building, Singapore 079117

Please charge to my credit card

I, _____ hereby authorize CFA Singapore to charge my credit card

account for the amount \$ _____ SGD

Credit Card (VISA/AMEX/MC): _____ (Expiry: __ /20__)

Signature/ Date