

Program Details

Sponsor Name:	Zeo Capital Advisors
Program Name:	Are You Avoiding Duration Pitfalls?
CFP Board Program ID:	203042
Description:	<p>This 50-minute program teaches how to identify and avoid common pitfalls that allocators fall into when using duration as a factor in selecting fixed income investments. With no market standard for duration calculations, many allocators are unaware they are comparing apples and oranges. First, we will explore three different meanings of the term duration: * Interest rate * Risk spread * Asset/liability matching Next, we explain how each concept of duration can be used to help investors uncover hidden risks in their investment portfolios. Then, we show how to apply these distinct duration concepts appropriately in selecting fixed income investments and managing portfolios. We conclude by providing a checklist for allocators to spot duration red flags when selecting funds for specific client situations.</p>
Learning Objectives:	<p>A. Break down “duration” into distinct concepts and meanings. B. Identify risks in oversimplifying duration. C. Apply these various duration concepts appropriately in fixed income investment selection, portfolio management. D. Spot red flags using a checklist.</p>
Level of Complexity:	Intermediate
Ethics:	No
Method of Delivery:	Live
Start Date:	03/13/2015
End Date:	12/31/2016
Program Status:	Active
Total Hours Requested:	1.00
Total Hours Granted:	1.00