CERTIFICATE IN FINANCIAL MANAGEMENT FOR THE FAMILY OFFICE

Managing and Building Wealth through Effective Financial Management, Oversight, and Making Informed Investment Decisions.

The Certificate in Financial Management for the Family Office program is a two and a-half day, curriculum-based training program developed by Pepperdine University's Graziadio School of Business and Management in association with **Lido Consulting, Inc**.

Dates and Time:

- Monday, March 19, 2012 — 8 a.m. - 5:30 p.m.
- Tuesday, March 20, 2012 — 8 a.m. - 5 p.m.
- Wednesday, March 21, 2012 — 8 a.m. - 1 p.m.

Location:

Graziadio Villa Executive Center at Pepperdine University
24255 Pacific Coast Highway, Malibu, CA 90263

Learn More:

bschool.pepperdine.edu/family-office

LIDO
CONSULTING, Inc.

PEPPERDINE UNIVERSITY
Graziadio School of Business and Management

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6100 Center Drive, Suite 300
Los Angeles, CA 90045

Certificate Program Details:

Designed for family office management personnel, family members, individuals from affluent backgrounds, and advisors that work within the family office space. The certificate qualifies for continuing education credit for CPAs licensed in CA, MCLE for attorneys licensed in CA, CFPs and may qualify for other credentials depending on the state of jurisdiction.

The Objectives:

- Learn the skills to develop in-depth budgets for business and personal activities as a basis for long-term planning and portfolio management
- Best practices for financial reporting as a tool for decision making, levels of delegation of authority, organization oversight, and accountability
- Evaluate different legal and organization structures for wealth preservation, wealth transfer, and tax minimization
- Assess portfolio creation, the risk/return relationship, and wealth management tools
- Study various investment opportunities including both public and private markets, alternative investments, real estate investments, and international investment opportunities

Register by January 31, 2012 and save $500 on registration.

Learn More: **bschool.pepperdine.edu/family-office**
or contact **Rachel.Williams@pepperdine.edu**