

SCHULTZ COLLINS LAWSON CHAMBERS, INC.

invites you to attend:

**A Symposium on Wealth Management Strategies for Troubled Times**

**Keynote Discussion Leader: Patrick Collins Ph.D. CFA**

5:00 p.m. to 8:00 p.m.

March 17 | March 24 | April 2

Symposium:<sup>1</sup>

- 1) *In ancient Greece, a convivial meeting for drinking, music, and intellectual discussion.*
- 2) *A social gathering at which there is a free interchange of ideas.*
- 3) *A formal meeting at which several specialists deliver short addresses on a topic.*
- 4) *An academic conference or university class characterized by an openly discursive format.*

Among the issues and questions we intend to address:

- **Confronting the “Threshold Limit” in the value of your Portfolio:** As credit markets seized up and stock markets incurred steep losses you may have made an *ad hoc* decision to change the structure of your portfolio. This decision may have been driven by a decline in portfolio value to your threshold limit – i.e., the level at which you are unwilling to incur further losses. Are there wealth management strategies that anticipate this decision, or even set it in motion at a predetermined level?
- **Evaluating the impact of the Financial Crisis on your personal circumstances:** The recent declines in the stock market have likely changed your position relative to your primary objectives, such as providing for a comfortable retirement. What tools are available to reevaluate your position, compare portfolio options, and reliably project the odds that you will succeed in the future?
- **Coming to grips with a change in your tolerance for risk:** Risk has taken on a new meaning for many investors, for obvious reasons. How can you reassess your risk tolerance, and then use this information to adjust the structure of your portfolio? Should you consider shifting to an alternative wealth management strategy?

---

5:00 to 5:30:	Welcome reception, in the spirit of the ancient Greeks
5:30 to 6:45:	Discussion led by Patrick Collins
6:45 to 8:00:	General conversation and Q&A

The event will be hosted in our San Francisco office. A symposiarch,<sup>2</sup> firm principals, and staff will be in attendance. Space is limited, so an RSVP is essential. Call us at 415 291-3000 to make a reservation.

---

<sup>1</sup> From Merriam Webster on line edition, Dictionary.com & Wikipedia

<sup>2</sup> In ancient Greek times, symposia were overseen by a symposiarch, who would decide how strong or diluted the wine for the evening would be, depending on whether serious discussions or merely sensual indulgence were in the offing.