***The Behavioral Portfolio***   
 **Description**

Investment advisors face two challenges. First, the portfolios offered to clients leave investors vulnerable to severe economic events and emotional stress. Second, the way that we educate investors about their portfolios isn’t effective at helping them curb biases.

The Behavioral Portfolio examines the risks of both stock and bond portfolios from a historically comprehensive perspective to help illustrate that, based on market history, the current approach could lead to a break-down of clients’ portfolios and our practices. It then lays out an all-seasons approach for investing that both embraces optimism and addresses contingencies of significant risk events.

Communications and investor education then shift to pro-actively prepare investors for challenges ahead. Instead of following the crowd and moving out of assets at unfavorable times, investors are trained to understand the markets so they can enjoy a higher probability of success and greater peace of mind throughout their investing lives.

**Includes:**Live Interactive Presentation 55 minutes + Q & A and fireside chat   
  
**Support materials:**  
Downloadable presentation slides PDF  
Advisor support via investment portfolio stress tests   
The Behavioral Portfolio Key Points Guide PDF  
The Behavioral Portfolio Book <https://www.amazon.com/Behavioral-Portfolio-Managing-Portfolios-Investor/dp/0857197444>  
  
**LEARNING OBJECTIVES   
Upon completion the attendee should be able to identify and talk with clients about:**

1. Re-defining foundational portfolio objectives such as market gains, low risk of extreme losses, and protection against high inflation.
2. The process of quantifying and building Behavioral Portfolios, illustrating how advisors can improve an investor’s probabilities of success.
3. Pro-active strategies that help investors understand portfolio components and embrace the sometimes contrarian decision making that helps avoid known biases.
4. Move beyond traditional stock-and-bond strategies to build portfolios that aim to withstand market swings.
5. Helping clients overcome emotional investment biases.
6. Using historical insights and innovative tactics to prepare for all types of market scenarios
7. A mindset of informed decision-making
8. Navigating volatility with confidence and peace of mind