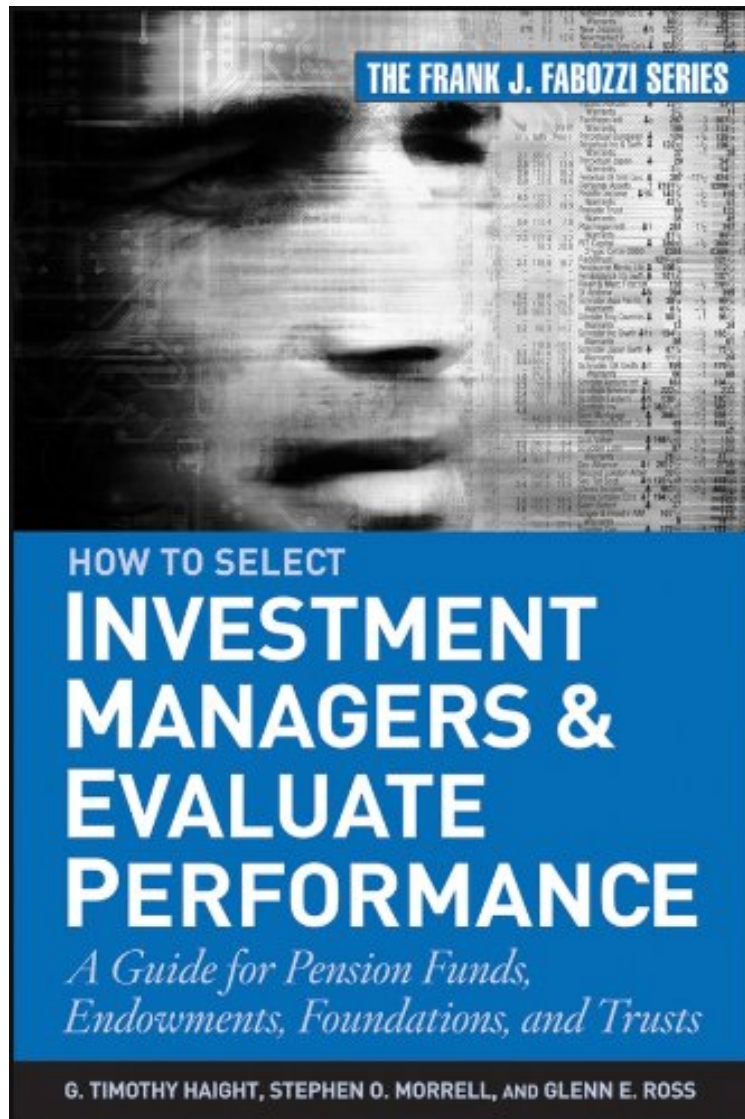


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How to Select Investment Managers and Evaluate Performance: A Guide for Pension Funds, Endowments, Foundations, and Trusts (Frank J. Fabozzi Series)

G. Timothy Haight, Glenn Ross, Stephen O. Morrell
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0 of 0 people found the following review helpful. Four StarsBy DustinI found an error on page 166 regarding the interpretation of a Beta of 1.040 of 0 people found the following review helpful. Five StarsBy mattGreat

An informative guide to selecting and evaluating external investment professionals This book-one of the very few of its kind-is an invaluable aid to trustees of pension plans, endowments, and trusts who seek to chart and navigate courses for governing and overseeing the investment of the trillions of dollars under their care. It covers many aspects of this essential endeavor, including return measures, fixed income and duration, manager searches, committee meetings, and much more. G. Timothy Haight (Atherton, CA) is President of Menlo College in Silicon Valley. Stephen O. Morrell, PhD (Coral Springs, FL) is Professor at Andreas School of Business of Barry University. Glenn Ross (Baltimore, MD) is a Managing Director and cofounder of Archstone Portfolio Solutions.

"These guys know how to check their facts."nbsp; (Albourne Village - village.albourne.com, Tuesday 22nd January 2008) "...this useful guide for professionals is timely."nbsp; (Pensions World, February 2008)From the Inside FlapPeople charged with the governance and oversight of pension plan, endowment, and trust investments for corporations, nonprofit institutions, and state and local governments face substantial and varied responsibilities. The processes of developing investment policies and strategies; selecting investment managers to implement policies and strategies; and evaluating investment manager performance are critical to success. All too often, however, the individuals with ultimate responsibility for selecting investment professionals and evaluating their performance;pension plan trustees, endowment fund board members, and investment committee members of boards;lack even the most basic knowledge and understanding of the processes and criteria involved in selecting investment professionals and evaluating their performance. How to Select Investment Managers Evaluate Performance provides an invaluable aid to trustees of pension plans, endowments, and trusts who seek to chart and navigate courses for governing and overseeing the investment of the trillions of dollars under their care. Individuals who are in such roles must be well versed in the full range of techniques used to evaluate the effectiveness of investment professionals. This book;one of the very few of its kind;offers detailed, clear advice on improving the effectiveness of those who are entrusted with the oftentimes daunting responsibility of selecting, overseeing, managing, and evaluating investment professionals. The expert authors cover all facets of selecting managers and evaluating performance, including information on investment vehicles such as hedge funds, FOFs, and alternative investments; international investments, including currency impact between country investments; return measures, including a detailed discussion of net of tax calculations; measuring the sensitivity of a bond to interest rate moves; mutual funds and their cost-effectiveness for diversification purposes; manager searches using questionnaires; committee meetings and investing consulting services; and much more. The passage of the Sarbanes-Oxley Act of 2002 combined with explosive growth in the number and types of financial instruments has raised the bar on what is required for those entrusted with oversight responsibilities. How to Select Investment Managers Evaluate Performance provides those individuals with a comprehensive, yet easy-to-understand guide to being a successful trustee.From the Back CoverHow To Select Investment Managers Evaluate Performance The key to successful investment management is to select investment professionals who can best meet clients' investment goals, objectives, and needs. How to Select Investment Managers Evaluate Performance provides those who are responsible for the investment performance of their institution's funds;including pension plan trustees, endowment fund board members, and investment committee board members;with the essential knowledge and skill set required to properly select investment managers and to evaluate their performance in a systematic manner. This book describes cutting-edge techniques used to evaluate the performance of investment funds and their managers and provides valuable insight into the roles and responsibilities;in light of the Sarbanes-Oxley Act of 2002;of those charged with this oversight. In a clear and understandable fashion, the authors offer key advice on such topics as establishing investment policy statements, alternative investments, investment approaches and styles, return-risk measurements, how overall portfolio performance is evaluated, how to conduct a search for investment managers, and much more.