

## **Breakfast Meeting Monday 3<sup>rd</sup> November 2015 7.30-9.00am**

**Some of topics I shall be covering:**

### **My case studies**

A very brief overview of the “curriculum”.

### **The science of investing**

Is the science of investing sorted? If so what’s next to learn?

### **Behavioural science**

Why this is my next focus when interacting with clients. This may also help you too.

### **Reporting to clients**

How I do it and what’s important.

### **Discretionary Investment Management Services**

How I got my DIMS licence, why this is important and what happens next.

### **Questions**

What have you been wanting to ask me?