



Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities
(MN Dept. of Commerce Provider #8724)
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Program Title: **Navigating the New Fixed Income Markets**

Speaker: Paul Blomgren, CFA
Senior Vice President / Client Portfolio Manager
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Date: Thursday, May 3, 2018

Time: 11:00 AM Sign-in/Networking
11:15 AM Lunch Buffet Open
11:30 AM Chapter Business
12:00 PM – 1:00 PM Presentation | Paul Blomgren
1:10 PM – 1:40 PM Case Study | Joan Gilles

Location: **Dakota Lodge**
1200 Stassen Lane, West St. Paul, MN 55118

CE Credits Hour I: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.0 hours of standard classroom credit toward continuing insurance education requirements.
PENDING .5 CREDITS
CFP: 1 hour standard credits APPROVED for the Presentation and 1 hour APPROVED for the Case Study.
CLE: 1.5 hours Standard credits: 1 hour APPROVED .5 hours PENDING.
A Certificate of Attendance will be provided for individuals requesting credits for CPE and PRP (Professional Recertification Program - formerly PACE.)

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs.

Educational Level: Overview

Presentation Description

The Navigating the New Fixed Income Markets presentation seeks to provide advisors and investors with an understanding of the key concepts, trends and elements of the fixed income market critical to their knowledge of, and ability to evaluate, fixed income investments.

This is considered an Overview level of complexity, and is intended to be an introduction to key themes, indicators, relevant statistics/data and trends important to a financial advisor and an investor's understanding of the fixed income market.

Learning Objectives

After completing this presentation, participants will have a basic understanding of

- The current state of the Fixed Income market and near term outlook
- Key factors in fixed income markets-including interest rates, inflation, economic growth and the role of the Federal Reserve
- Issuance and demand
- Valuations and return drivers
- Credit spreads
- Tutorial on Fixed Income Sectors performance in rising rate environments
- Correlation factors
- Go forward outlook and return potential for the asset class/market

Outline:

- 1) Introduction = 5 min
- 2) Today's market environment = 5 min
- 3) Rate outlook = 3 min
 - a) Fed path = 3 min
 - b) Factors keeping rates low = 5 min
 - i) Accommodative global monetary policy = 3 min
 - ii) Subdued Inflation = 3 min
 - iii) Relatively attractive US rates = 3 min
- 4) Income creates total return = 3 min
- 5) Credit cycle = 5 min
 - a) Elevated volatility = 3 min
 - b) Recessions mark end of cycle = 3 min
- 6) Nongovernment sectors attractive = 5 min
 - a) Investment grade corporates = 3 min
 - b) High yield = 3 min
- 7) Managing rate risk = 5 min

Total Time 60 Minutes

Instructional Materials for Students:

- PowerPoint in handout format

Examination & Answers:

- No exam