



## CFA Institute Conference: Wealth Management 2020

24–26 March 2020  
The Westin Seattle  
Seattle, Washington, United States

The attendee will

- understand evolving trends in wealth management and financial planning;
- learn how different firms are approaching ESG investing;
- understand the impact of behavioral biases in client perceptions about wealth and risk;
- explore current trends in global capital markets and capital market–related policy; and
- learn latest practices related to investment firm and practice management, including standards of service, managing client relationships, and client reporting.

### **Credit Amount**

- CFA Institute CE Program: 11 credit hours
- NASBA: 13 credit hours in the content area of Finance

### **Additional Information**

- Delivery Method: Group Live
- Program Level: Intermediate
- Prerequisites: Finance
- Advanced Preparation: None

For additional information on Wealth Management 2020, please visit the [conference page](#).

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