my investment journey
three-part seminar series on fundamentals of investing

The Bongiorno Group with global investment managers, BlackRock, invite you to a Bongiorno exclusive event series, "My Investment Journey" .

- Gain an understanding of the markets, enabling you to carefully consider your options for investing in a world of portfolio-empowering possibilities.
- The world's largest asset manager ($5.98 trillion in assets under management), BlackRock is fast becoming the most respected investment and risk manager in Australia.
- Learn insights from the fundamentals of investing to the expert's perspective on domestic and world markets.

Session One - Tuesday 30th April, 2019

1. Introduction to investing including terminologies, market updates, risk profiles and asset allocations
2. How do I do it? – what are shares, bonds, ETF's?
3. What options are there for me? Why multi asset class investing?

Session Two – Tuesday 16th July, 2019

1. Learn how BlackRock make investment decisions
2. Portfolio rebalance and market update - learn about the reasons behind rebalances and what triggers an out of cycle rebalance

Session Three – Tuesday 22nd October, 2019

1. Discovering the art & science of investment management and decision making
2. An introduction to Aladdin - BlackRock's real time money management technology
3. Extended market update

To register your interest and secure a place please email **Anneliese Shortt** on **ashortt@bongiorno.com.au** or phone on **9863 3307** asap.

- True value and key learnings will be experienced by attending all events.
- Held at the Bongiorno Group (or a suitable venue) in the evenings from 6.30 – 8.00pm. Light refreshments will be provided.

bongiornogroup
make every day a good day

our BlackRock speakers

James Waterworth, Vice President, Head of iShares Wealth - IFAs and Banks

Prior to re-joining BlackRock in September 2017, he worked for Societe Generale's Lyxor Asset Management as Director, UK & Ireland ETF sales based in London. Prior to this he worked for BlackRock in London as Vice President within EMEA corporate strategy and iShares UK & Ireland sales. James began his career in Sydney at UBS in equity derivatives sales.

James holds a Master of Applied Finance from Macquarie University and a Bachelor of Commerce, with honours, from the University of Sydney.

Joshua Persky, Vice President & Head of Model Portfolios & Solutions

Josh is responsible for the representation of the firm's model portfolios, as well as other portfolio construction strategies.

Josh joined BlackRock in June 2015, where he was most recently at MSCI (RiskMetrics) in New York, where he was a senior consultant for hedge fund analytics & sales.

Prior to leaving Australia for the US, he held senior roles in relationship management within the MSCI index & Barra business, helping pension funds & asset managers with ETF specific portfolio construction, performance attribution & risk management analytics.