



colorado chapter

connecting financial executives

FEI Colorado Chapter

CPE Details

Event Date: Thursday, March 15th

Dinner Session

Presentation Title	The National and Colorado State Economies
Presenter	Tatiana Bailey, Ph.D. / Executive Director, UCCS Economic Forum, University of Colorado
Presentation Description/Program Content	The presentation will start with a “big picture” overview of the major, macroeconomic indicators in the U.S. All data is trended back at least ten years to help provide context for today’s metrics. After the national overview, there will be a specific analysis of key Colorado metrics and how the state economy looks moving forward.
Learning Objectives	<ol style="list-style-type: none"> 1) Understand today’s U.S. macroeconomic climate including gross domestic product (GDP), GDP as a percentage of national debt, interest rates, the pros and cons of rising interest rates, the consumer price index, new job postings, unemployment and labor participation rates. 2) Understand how Colorado ranks in terms of the above metrics and a deeper dive into the state business climate, new business formation, opportunities and challenges. 3) Colorado real estate trends and how they tie to demographics 4) Workforce trends in Colorado and how communities can address the skills gap and workforce shortages 5) A brief comparison of a few of the above metrics between major cities in Colorado
NASBA Field of Study	Economics
Instructional Delivery Method	Group Live Lecture
Recommended CPE Credit	1 CPE Hour (50 minutes as defined by NASBA)
Prerequisites	None
Program Level	Intermediate
Advanced Preparation	None
Experience Level	Intermediate

PD1

Presentation Title	Hot Topics in Financial Risk Management: Changing the Game
Presenter	Amanda Breslin, CFA, CTP; Executive Director, Treasury Advisory, Chatham Financial Sid Basu, CFA, CPA; Manager, Risk Management Advisory, Chatham Financial
Presentation Description/Program Content	Hedging isn’t a new topic, but it does have a number of new twists. After prolonged near-zero rates, many companies are revisiting interest rate risk for the first time post-crisis after a more sustained climate of Fed rate hikes. Meanwhile, LIBOR replacement is being solidified, impacting loans and hedges alike. And if market changes weren’t impactful enough, changes in accounting standards have also played a role in the economic strategies being employed by companies. This session will focus on how companies have been navigating the current landscape of financial risk hedging.
Learning Objectives	<ol style="list-style-type: none"> 1) Understand how changes in the market landscape affect risk management (LIBOR replacement, current rate environment, M&A activity)

	<ul style="list-style-type: none"> 2) Understand how changes to hedge accounting standards are impacting risk management strategies 3) Evaluate common challenges in managing interest rate risk (resources, pricing, counterparty relationship management)
NASBA Field of Study	Economics
Instructional Delivery Method	Group Live Lecture
Recommended CPE Credit:	1 CPE hour (50 minutes as defined by NASBA)
Prerequisites:	None
Program Level:	Intermediate
Advanced Preparation:	None
Experience Level:	Intermediate

PD2

Presentation Title	ESG (Environmental, Social and Governance) Investing
Presenter	Matthew Burnett, Senior Portfolio Advisor, Financial Advisor
Presentation Description/Program Content	Many of us have heard of ESG investing but few understand what it means and why it should be considered. ESG stands for Environmental, Social and Governance. There is growing evidence that suggests that ESG factors, when integrated into investment analysis and portfolio construction, may offer investors potential long-term performance advantages. We'll discuss the history of ESG strategies, how they've evolved and why this is such a prevalent topic in today's society.
Learning Objectives	<ul style="list-style-type: none"> 1) History of ESG investing 2) Current ESG strategies 3) Why you'd want to consider adding these strategies to your portfolio
NASBA Field of Study (see attached):	Management Advisory Services
Instructional Delivery Method:	Group Live Lecture
Recommended CPE Credit:	1 CPE hour (50 minutes as defined by NASBA)
Prerequisites:	None
Program Level:	Intermediate
Advanced Preparation:	None
Experience Level:	Intermediate