



**SECURING PERSONAL INVESTMENTS DURING UNCERTAIN TIMES:
SAFEGUARDING ASSETS AND EVALUATING ADVISORS**
March 26, 2009

AGENDA

- 7:30 am – 8:00 am** **Registration and Continental Breakfast**
- 8:00 am – 8:10 am** **Welcoming Remarks**
Joseph B. Tyson Jr., Chair, Foley's Business Law Department
- 8:10 am – 8:50 am** **Economic Background & Update**
Jay N. Mueller, CFA, Senior Portfolio Manager, Wells Capital Management
- 8:50 am – 10:00 am** **Safeguarding Your Investments: Overview and Discussion**
Moderated by Foley Senior Counsel Kristine Havlik
- *Overview of FDIC Bank Deposit Insurance
Foley Partner Emory Ireland*
 - *Overview of SIPC Brokerage Account Insurance
Foley Partner George T. Simon*
 - *Overview of Trust Accounts
Foley Partner John F. Callan*
 - *Overview of Retirement Accounts
Foley Partner Harvey A. Kurtz*
- 10:00 am – 10:15 am** **Break**
- 10:15 am – 11:45 am** **Evaluating Your Advisors**
Foley Partners Emory Ireland, Adam Wiensch, and Foley's Director of Fiduciary Administration, Robert Mueller
- *Guidelines for Investment Advisor Selection*
 - *A Practical Due-Diligence Checklist for Private Investors*
 - *Reviewing Investment Pitfalls & Schemes*
- 11:45 am - Noon** **Closing Remarks**