



&

AnalystSolutions

Invitation

2-Day Workshop on Equity Research Analysis

Dear Members, Candidates and Friends,

CFA Society Greece and AnalystSolutions are hosting a 2-day workshop on Equity Research Analysis with **James J. Valentine, CFA** on 8 & 9 of November 2018 at Electra Palace Athens Hotel, 18- 20, N. Nikodimou Street, 10557 Athens, Greece, from 09:00-17:00.

The topics to be covered in this 2-day event are:

- Identify and monitor a stock's critical factors (Part 1 & 2)
- Presentation: "Are you a great Analyst?"
- Generate differentiated insights through better discovery, questioning, and influencing (Part 1 & 2)
- Maximize your time for Alpha Generation (requires taking a time management assessment)
- Apply practical Valuation Techniques for more accurate price targets
- Master the Stock Call Techniques of highly experienced Analysts (Part 1 & 2)
- Communicate unique Stock Calls successfully so others take action

You can find an overall view of the program and more details about each workshop at [AnalystSolutions website](#)

This is an extensive 2-day workshop focused on Equity Research Analysis, intended for equity research analysts, CFA charterholders and candidates, and those interested in learning more about performing Financial Analysis on equities. Kindly note that there is a strict deadline until Friday, 19 October 2018 to register at events@cfa.gr. We anticipate very high demand and seats will be limited. **There is a fee of 50 Euro for Members of CFA Society Greece and 100 Euro for non-Members.** Please note that the above fee includes coffee breaks and meals.

Upon registration and receiving the full payment we will send to all participants the full program and other details, some of which are mentioned below:

- All workshop participants are encouraged to bring their laptops (and chargers) because all the material will be available in a digital format to be able to download and use it throughout the workshop.
- There is an optional pre-work for most of the workshops but for the “Maximize Your Time for Alpha Generation” workshop there is a required time management assessment that should be taken beforehand by every active equity research analyst.
- For the presentation “Are You a Great Analyst?”, anyone who is currently an equity research analyst may choose to take the optional GAMMA PI™ assessment.

Thank you for your interest and support.

Kind regards,

CFA Society Greece

For registration please send a message and the payment receipt at events@cfa.gr. Once we receive it, we'll be able to confirm your seat via email.

Disclaimer: Payments should be net off any bank transfer charges. No place is guaranteed unless you have received a confirmation email from the Society. Any place paid and not confirmed, will be reimbursed in full. Seats will be granted on a first come first served basis.

Payment details: Piraeus Bank, IBAN: GR38 0172 0320 0050 3201 5984 144

Beneficiary: "ΕΛΛΗΝΙΚΗ ΕΝΩΣΗ CFA"

Should you face any difficulties, please send an email to events@cfa.gr. For invoices, please contact treasurer@cfa.gr.

As a participant in the CFA Institute Approved-Provider Program, CFA Society Greece has determined that this training course qualifies for **10 Continuous Education (CE) hours**. If you are a CFA Institute Member, Continuing Education credit for your participation in this event will be automatically recorded in your CE Diary.

Bio for **James J. Valentine, CFA**

James Valentine, CFA, started his career as an equity research analyst. The major North American investor polls ranked him among the top three in his sector for ten consecutive years and Forbes identified him, as one of the top three among all 2,000 U.S. sell-side analysts. At the height of his career as an analyst, he was asked to take on a newly-created role as Director of Training for Morgan Stanley's Global Research department. After implementing a new global training program for 500 analysts and associates, he realized far too many buy-side and sell-side analysts were approaching this profession without a strategy, which held them back from generating alpha. To remedy this, he began his independent effort by writing the top-selling book “Best Practices for Equity Research Analysts” and then founded AnalystSolutions, to help all active and prospective analysts to improve their stock picking and receive greater recognition for those calls. In 2015, he was initially asked to teach an investments class at DePaul University, which eventually led him join the Finance Department as a Clinical Professor and as the Executive Director of the Center for Behavioral Finance.

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