As an Executive Education participant, you will have a transformational experience at Chicago Booth that will help you become a more empowered, impactful leader.

BUILD ON YOUR CAREER SUCCESS AT BOOTH

The University of Chicago Booth School of Business is the second oldest business school in the United States and the first to teach executives. Our academic programs consistently rank among the top schools in surveys worldwide.

In our Executive Education programs, ideas compete and people collaborate. Concepts are authentically and rigorously tested and refined through honest and thoughtful discussion and discourse. After being immersed in one of our programs, you will leave Booth prepared to face any business challenge, at any company, in any industry—for the entirety of your career.

MAXIMIZE YOUR TEAM’S IMPACT

Often, organizations send a team of employees to our programs to increase team dynamics and foster a common goal. Our finance programs provide the perfect opportunity to learn— as a team—how to create value and drive corporate performance.

Benefits of group enrollment include:

- Discounted program pricing
- Simple group registration process
- Opportunities for your team to collaborate with each other and learn from global participants facing similar business challenges

LEARN FROM THE LEADING MINDS IN MODERN FINANCE

As home to nine Nobel laureates who have helped define the study of economics and the nature of today’s financial markets—and as the alma mater of countless alumni who are now CFOs of Fortune 500 and entrepreneurial firms—Chicago Booth is the ideal setting for executives looking to broaden their financial knowledge and to become strategic leaders in their organizations. Our finance faculty has a long history of groundbreaking advancements that have revolutionized the industry, making our finance curriculum second to none.

By participating in our finance programs, you will benefit from collaborating with the brightest minds who will expose you to cutting-edge ideas in this fascinating field. You’ll gain practical insights into the management of financial assets and learn to evaluate risk and reward through an empirical lens.

Booth faculty members in finance present topics in a variety of ways—including lectures, case studies, and small group discussions—using a range of media. This comprehensive approach helps elevate your learning experience at Booth.

CUSTOM LEARNING SOLUTIONS

In addition to the Executive Education programs listed in this guide, Chicago Booth also offers high-impact custom learning solutions that are tailored to meet the specific leadership development objectives of our clients.

To learn more about creating a custom program with Booth, visit ChicagoBooth.edu/ExecEd or contact us at +1 312.464.8732.
FIND THE RIGHT PROGRAM FOR YOU

Our finance programs equip leaders to be consistently decisive, analytical, and nimble by focusing on how to interpret information within the context of decision-making and business strategy.

Participants range from nonfinancial managers to senior finance executives.

THE EXECUTIVE FINANCE PROGRAM (EFP)
AUDIENCE: Senior management with a working knowledge of finance and accounting terms and principles.
KEY BENEFITS: Achieve a more sophisticated understanding of how the tools of modern finance can be used to evaluate investment opportunities and make capital structure and capital management decisions to drive organizational value.

THE EXECUTIVE PROGRAM FOR PROSPECTIVE CFOS (EPPC)
AUDIENCE: CFOs, deputy CFOs, treasurers, controllers, senior VPs, and finance directors.
KEY BENEFITS: Develop broad financial strategy and hone leadership skills needed to lead enterprise transformation and growth.

FINANCIAL ANALYSIS FOR NONFINANCIAL MANAGERS (FANM)
AUDIENCE: Mid- to senior-level executives without formal training in finance and accounting.
KEY BENEFITS: Learn how to interpret and use financial reports to make better business decisions.

THE LATIN AMERICAN CFOS’ EXECUTIVE PROGRAM (LACFO)
AUDIENCE: Latin America-based senior finance executives from companies that have annual sales volume of at least $20 million (USD) and 200-plus employees.
KEY BENEFITS: Frameworks and tools to enhance financial and leadership skills needed to make critical, strategic decisions that create sustainable value.

Oxford Chicago Valuation Program
Chicago Booth and Said Business School (OCV)
AUDIENCE: Finance professionals and senior executives who make strategic corporate or private equity investment decisions.
KEY BENEFITS: Learn how to apply valuation to make better strategic corporate and investment decisions.

PRIVATE WEALTH MANAGEMENT (PWM)
AUDIENCE: High-net-worth individuals and families who meet the application requirements.
KEY BENEFITS: Gain context to establish realistic wealth management goals and frameworks to develop a comprehensive wealth management strategy.

ONLINE PROGRAM
CHICAGO BOOTH APPROACH TO FINANCE (CBAF)
AUDIENCE: Mid- to senior-level managers who do not have formal training in finance and accounting and executives who wish to update their knowledge of core finance and accounting principles.
KEY BENEFITS: Gain the tools to make impactful financial decisions by unlocking critical insights in business performance.

LIVE-ONLINE PROGRAMS
WEALTH PLANNING ESSENTIALS (WPE)
AUDIENCE: Wealth owners only, with financial assets of USD $10 million or more.
KEY BENEFITS: Gain wealth management essentials to navigate these uncertain times.

CHICAGO BOOTH CIMA® EDUCATION PROGRAM (CIMA)
NEW ONLINE FORMAT
AUDIENCE: Experienced financial professionals from a variety of backgrounds and business models.
KEY BENEFITS: Gain sophisticated investment knowledge to attain a level of competency as an advanced investment advisor or consultant.

CERTIFIED PRIVATE WEALTH ADVISOR® (CPWA®) CERTIFICATION
AUDIENCE: Wealth managers who work with high-net-worth individuals.
KEY BENEFITS: Understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.

CONTACT US: +1 312.464.8732

3
THE EXECUTIVE FINANCE PROGRAM (EFP)

FINANCIAL STRATEGIES TO DRIVE PERFORMANCE AND VALUE

Executives will build on their knowledge of basic finance to achieve a more sophisticated understanding of how the tools of modern finance can be used to evaluate investment opportunities and make capital structure and capital management decisions to drive organizational value. Participants will also learn how to assess M&A, private equity, and venture capital opportunities.

WHO SHOULD ATTEND?

Executives in finance-related roles, or those who have strategic financial oversight of their unit or organization, or those who expect to have more financial responsibility in the future. Titles include: C-suite, president, general manager, managing director, VP, director, financial advisor, controller, treasurer, and general counsel.

PROGRAM BENEFITS

By attending this program, you will:

• Obtain a deeper understanding of how your organization’s economic outcomes are reflected in its financial statements, and how those statements are used inside and outside the organization

• Gain a sophisticated understanding of how to use financial statements to better understand the economics of other entities, including competitors

• Communicate more effectively with financial executives within the organization and with important external stakeholders such as analysts and investors

• Better understand how to use modern valuation techniques to evaluate investment opportunities, both projects and other businesses, including M&A and LBOs

• Learn why optimizing management of capital, including liquidity and leverage, can affect firm value and how to value other businesses

• Understand entrepreneurial finance, including private equity and venture capital

• Learn how to manage external communications and capital to avoid unwanted attention from activist investors, short-sellers, and other corporate predators

• Develop a strong strategic intuition in order to make smart investment decisions: scan for patterns, analyze what makes your organization great, and assess what the competition is doing

HIGHLY-FOCUSED, SELF-PACED ONLINE MODULES

Gain access to highly focused, online finance learning modules that complement program content and strengthen your technical skills.
“I can see why Booth is rated so high among other Executive Programs—the content was delivered in an understandable fashion by teaching faculty who can balance theory with practicality. Booth is a great investment!”

CHRIS STANTON
PRESIDENT, PRATT RETAIL SPECIALTIES

PROGRAM OUTLINE

Financial Statement Analysis and Cash Flow Forecasting
- Learn terminology, review of financial statements, cash flows, DuPont formula
- Use DuPont analysis to understand drivers of profitability
- Evaluate quality of earnings analysis
- Understand free cash flow versus earnings

Investment Decisions and Valuation
- Evaluate projects using net present value (NPV) and internal rate of return (IRR)
- Calculate cost of capital: weighted average cost of capital (WACC)
- Study valuation methods: discounted cash flow (DCF), multiples, adjusted present value (APV)
- Apply valuation to M&A deals

Financing Decisions
- Understand financing sources
- Analyze the basics of capital structure decisions and how these decisions affect value
- Learn the choices among financial instruments to implement desired capital structure
- Examine distressed debt

Entrepreneurial Finance and Strategy
- Gain an overview of entrepreneurial finance, PE, VC, and LBOs

Formulating Strategy
- Understand the vital difference between goals, strategy, and management: which are easy and which are difficult?
- Identify the role of top management in setting strategy: what is the real challenge great strategists see?
- Analyze competitors: learn how to better think about and predict competitors’ actions, and why this is critical for success
- Collect data to build your strategy: learn to identify which data are useful among the many sources

Creating Shareholder Value
- Explore practical perspectives: corporate governance and the role of boards; CFO viewpoint

FACULTY

Douglas J. Skinner
Deputy Dean for Faculty and Eric J. Gleacher Distinguished Service Professor of Accounting, Chicago Booth

Steven N. Kaplan
Neubauer Family Distinguished Service Professor of Entrepreneurship and Finance and Kessenich E.P. Faculty Director at the Polsky Center for Entrepreneurship and Innovation, Chicago Booth

Amir Sufi
Bruce Lindsay Professor of Economics and Public Policy, Chicago Booth

Gregory D. Bunch
Adjunct Professor of Entrepreneurship, Chicago Booth

Scott Meadow
Clinical Professor of Entrepreneurship, Chicago Booth

Note: Program and instructors are subject to change.
THE EXECUTIVE PROGRAM FOR PROSPECTIVE CFOS (EPPC)

Sharpen analytical skills, effectively manage relationships with internal and external constituencies, and drive strategic direction to lead enterprise transformation and growth, while applying cutting-edge research to the most pressing problems facing finance executives today.

WHO SHOULD ATTEND?

This program benefits senior finance executives who have significant experience in upper-level management or finance. Past participants have come from companies such as The Dow Chemical Company, IBM, AbbVie, Express, Hyatt Hotels, and TOTO USA, Inc. Titles include: CFO, deputy CFO, senior VP, finance director, treasurer, and controller.

PROGRAM BENEFITS

By attending this program, you will:

• Identify critical attributes needed to create a high-performance environment
• Articulate the corporate message internally and externally
• Analyze patterns in strategic thinking to identify a growth path
• Discover the power of big data in making marketing more accountable and understand the strategic and scientific approach to marketing analytics that results in higher ROI
• Develop a strategic plan for M&A execution and implementation
• Examine the valuation process for global investments and methods for calculating the cost of capital in an international context
• Analyze the sources of financial fragility and regulatory responses
• Learn how to harness continuous improvement and disruptive change to benefit the corporation

PROGRAM OUTLINE

High-Performance Leadership
• Understand the role of a leader and learn which attributes are most critical to creating high-performance environments

Straight Talk in Tough Times
• Learn how to get your message across to stakeholders and media

Evaluating Global Investments and the Cost of Capital
• Adapt capital budgeting to global opportunities
• Assess global risks and compute the cost of capital

Strategy Formulation and Implementation
• Develop simple tools that can be used when creating strategies
• Apply this strategy framework to identify a logical path for growth
“I believe that this course is a must for those individuals seeking to become CFOs. The course content and professors really help to open your mind to new concepts and ideas. I come away from the course armed with ‘gems’ that I can apply from day one in my current role.”

ELLIOTT WOOD
DIRECTOR OF FINANCE, GLOBAL TECHNOLOGY SERVICES AT IBM NORTH AMERICA
Gain a practical understanding of how to interpret and use internal and external financial reports to make informed business decisions. Once you know how to translate this financial information, you’ll be able to apply it to your business immediately.

WHO SHOULD ATTEND?

This program is useful for mid- to senior-level executives without formal training in finance and accounting. This course also attracts consultants, small business owners, scientists, engineers, healthcare professionals, and those who want to increase their financial acumen to make better business decisions. Titles include: C-suite, VP, president, owner, general manager, director, and chief counsel.

PROGRAM BENEFITS

By attending this program, you will gain skills necessary to:

• Read, understand, analyze, and interpret internal and external financial reports for the purpose of using this information to make better business decisions

• Understand accounting rules and principles and gain an appreciation for the effect of US GAAP and IFRS accounting methods on reported financial results

• Enhance your ability to forecast financial performance and better manage your financial resources

• Use the concept of the time value of money and decision metrics—such as net present value (NPV), internal rate of return (IRR), and payback—to make investment decisions

• Increase your effectiveness in strategic planning and decision-making

PROGRAM OUTLINE

Analyzing Historical Performance

• Financial statements: balance sheet, income statement, and statement of cash flows

• Accounting rules and conventions: GAAP and IFRS, historical costs, revenue recognition, matching

• Financial analysis tools: ratio analysis, multiples and comparables, cash flow analysis

• Special topics: goodwill and intangibles, active and passive intercompany investments, earnings management

Forecasting Financial Performance

• Present values, capital budgeting, and project evaluation

• Linking forecasts of operating and investing cash flows to investment decisions
Overview of Firms’ Internal Information Systems

• Objectives of cost accounting systems: introduction to product costing, integration of the costing system with the financial reporting system, use of cost data to support pricing decisions
• Costing systems in nonmanufacturing environments
• Limitations of traditional costing systems; signals of problems

Activity-based Costing and Activity-based Management Systems

• How they work and their advantages and disadvantages

Using Cost Information to Understand Profitability and Corporate Strategy

• Linking the costing system to corporate strategy
• Applying costing methods to understand customer profitability
• Cost behavior: fixed versus variable costs, break-even analysis, contribution margin analysis, sunk, incremental, and opportunity costs

Planning, Control, and Evaluation Systems

• Preparing and using budgets
• Analyzing budget variances
• Measuring performance: financial and nonfinancial measures such as ROI, EVA®, and balanced scorecard
• Designing incentives to motivate profit-maximizing behavior

PROGRAM DETAILS

DATES
December 6–10, 2021

SCHEDULE
Program starts at 8:30 a.m. on Monday and finishes by noon on Friday

INVESTMENT
$10,950
(accommodations not included)

LOCATION
Chicago Booth
Gleacher Center
Chicago

LEARN MORE
ChicagoBooth.edu/FANM

“...The case studies were fascinating, practical, and very informative. I’ll use these models in my current role to make a better, well-rounded decision in my day-to-day and yearly budget planning.”

ERIK ERICKSON
DIRECTOR, TRANSPORTATION SERVICES, UNION PACIFIC RAILROAD

FACULTY

Philip G. Berger
Wallman Family Professor of Accounting, Chicago Booth

Hans B. Christensen
Professor of Accounting and David G. Booth Faculty Fellow, Chicago Booth

Haresh Sapra
Charles T. Horngren Professor of Accounting, Chicago Booth

Kathleen Fitzgerald
Adjunct Associate Professor of Strategic Management, Chicago Booth

Note: Program and instructors are subject to change.
Today’s unpredictable and fast-changing business world requires executives from every level to have a solid understanding of finance and accounting core principles to make impactful business decisions. Practical financial decision-making is critical to an organization’s ability to combat competition, make strategic growth decisions, and create shareholder value.

When you enroll in Chicago Booth Approach to Finance, you experience world-renowned business education while becoming a member of our broader executive education community.

WHO SHOULD ATTEND?

This program is designed for mid-senior managers from across an organization, within a wide range of industries, who do not have formal training in finance and accounting and wish to develop or update their knowledge of core finance and accounting principles.

This program will also benefit those in professions such as consultants, scientists, engineers, healthcare, small- to medium-size business owners, and other professionals who want to increase their financial acumen to make better business decisions.

PROGRAM BENEFITS

By attending this program, you will:

• Strengthen your financial decision-making by learning core finance and accounting principles
• Learn how to evaluate and identify red flags in financial statements and balance sheets
• Discover how the relationship between profit and cash flow is crucial to the health of an organization
• Learn how to gain insight into an organization’s efficiency and profitability by using tools such as ratios and liability analysis
• Acquire the tools to financially forecast for proper business planning
• Strengthen your finance and accounting terminology to better communicate across your organization

FACULTY

Haresh Sapra
Charles T. Horngren Professor of Accounting, Chicago Booth
PROGRAM OUTLINE

Introduction to Accounting and the Accounting Process
• Become familiar with accounting, the language of business
• Prepare basic financial statements
• Understand how to apply the formula for the Statement of Cash Flows

The Profit & Loss Statement
• Understand the five concrete steps involved in applying the revenue recognition principle
• Become familiar with inventory accounting and the key issues related to it
• Be able to record discontinued operations under both US GAAP and IFRS standards, and to understand corporate taxes

Asset Analysis
• Distinguish between tangible and intangible assets
• Understand the concepts of depreciation and amortization
• Become familiar with the general rules for asset impairment

The Liability Analysis
• Understand and distinguish among the main categories of liabilities
• Recognize the principal components of noncurrent and current liabilities
• Grasp the concepts of off-balance-sheet accounting and contingent liabilities

Introduction to Valuation
• Understand the concepts of net present value (NPV) and internal rate of return (IRR)
• Calculate the free cash flow (FCF), the weighted average cost of capital (WACC), and the appropriate discount rate
• Articulate on other valuation methods, such as market multiples and comparable transactions

Analyzing Financial Statements
• Learn how to perform financial statement analysis through the use of ratios
• Understand how to examine a company’s cost structure
• Perform liquidity and solvency analysis

Note: Program dates, instructors, and fee are subject to change.

This program is offered in partnership with Global Alumni.

PROGRAM DETAILS

DATES
September 21–November 15, 2021

PROGRAM FORMAT
Online

PROGRAM DURATION
Eight weeks, 3–5 hours per week

LANGUAGE
This program is offered in English, Spanish, and Portuguese

INVESTMENT
$2,800 USD

LEARN MORE
ChicagoBooth.edu/CBAF
The Latin American CFOs’ Executive Program is a joint offering by Chicago Booth and Seminarium Internacional.

WHO SHOULD ATTEND?

This program is for senior executives in Latin America with a minimum of 10 years of experience in upper-level management or finance. Participants come from companies that have a yearly sales volume of at least $20 million (USD) and 200 or more employees. Titles include: chief financial officer, general manager, president, and vice president.

PROGRAM BENEFITS

By attending this program, you will:

• Recognize the characteristics of high-performing work groups that drive financial results and innovation
• Identify key data that drives strategy, and analyze powerful patterns in strategic thinking
• Explore prospects for growth in emerging markets
• Understand the challenges in financial regulation, the likely path of regulatory reform, and the implications for Latin America
• Gain a framework for improving negotiation outcomes through hands-on practice and the latest advances in the field
• Understand what drives differences in the cost of capital around the world, the impact on capital budgeting, and the valuation of international investments
• Analyze the strategic and organizational factors that influence the successes and failures of acquisition
• Learn the components of effective risk management
• Learn how to de-risk business decisions
“It is a program that provides an excellent update on economic issues, corporate finance, strategy, negotiation, evaluation of performance, and talent management—which are key components to increasing the value of an organization and for proper management of the shareholders’ resources.”

OSCAR ALBERTO BERNAL ROJAS
GERENTE DE GESTIÓN VP EMPRESAS Y GOBIERNO, VALORES BANCOLOMBIA S.A.

PROGRAM OUTLINE

• Driving high performance
• Strategy formulation and implementation
• The global economy and its effects on business
• Managing financial volatility
• Negotiation strategies
• Evaluating global investments and the cost of capital
• Financing strategy
• De-risking business decisions
• Mergers and acquisitions

FACULTY

Randall S. Kroszner  
Deputy Dean for Executive Programs and Norman R. Bobins Professor of Economics, Chicago Booth

Christian Leuz  
Joseph Sondheimer Professor of International Economics, Finance, and Accounting, Chicago Booth

Gregory D. Bunch  
Adjunct Professor of Entrepreneurship, Chicago Booth

Linnea Gandhi  
Adjunct Assistant Professor of Behavioral Science, Chicago Booth

Charles J. Hadlock  
Visiting Professor of Finance, Chicago Booth

John Burrows  
Senior Lecturer in Leadership, the University of Chicago Harris School of Public Policy

Susan Lucia Annunzio  
President and CEO, The Center for High Performance (CfHP)

Note: Program and instructors are subject to change.

PROGRAM DETAILS

DATES
Check back soon for 2022 dates

INVESTMENT
$8,300  
(accommodations not included)

LOCATION
Chicago Booth  
Gleacher Center  
Chicago

LEARN MORE
ChicagoBooth.edu/LACFO

CONTACT US: +1 312.464.8732
MERGERS AND ACQUISITIONS (MA)

This interdisciplinary program gives executives the analytical framework and tools necessary to successfully execute mergers, acquisitions, and corporate restructuring.

WHO SHOULD ATTEND?

This program is designed for senior and upper-middle level executives who are now or will be involved in M&A activity. Titles include: C-suite, general manager, vice president, director of business development, director of finance, strategic planner, business unit manager, general counsel, and analyst.

PROGRAM BENEFITS

During this program, you will:

• Develop a strategic plan for M&A activity
• Analyze strategic alternatives to M&A
• Understand the M&A due diligence process and develop your due diligence skills
• Understand business valuation techniques
• Implement a strategy for integration and restructuring
• Structure the deal to minimize tax consequences
• Learn how to best protect shareholder value during M&A
• Understand the use of M&A by large public corporations, privately held middle-market firms, and private equity firms
• Learn a playbook of M&A best practices

PROGRAM OUTLINE

Strategy Formulation

• Create competitive advantage through acquisition, merger, divestiture, or alliance
• Determine attractiveness and fit of a candidate
• Analyze the alternatives to M&A such as strategic alliances or joint ventures

Investment Decisions and Financing

• Understand valuation methods in evaluating M&A prospects
• Consider capital structure and financing choices and understand/compute pro forma metrics
• Review an LBO transaction and financing structure
• Understand market reaction to transactions

REGISTER TODAY: ChicagoBooth.edu/ExecEd
“Such a great program that covers the essentials of strategy, valuation, tax, and integration. An absolute must for successful M&A execution.”

ROB VASSEL
DIRECTOR OF BUSINESS DEVELOPMENT, THE CLOROX COMPANY

PROGRAM OUTLINE (CONTINUED)

Tax Implications
• Understand tax implications of various tax structures for both buyer and seller
• Structure transactions to maximize the seller’s after-tax wealth and to minimize the buyer’s after-tax cost
• Become familiar with various valuation implications of tax planning for mergers, acquisitions, and divestitures

M&A Strategy and Target Identification, Deal Phase, and Due Diligence
• Develop an end-to-end process view of corporate development and M&A
• Obtain tools to identify and prioritize acquisition targets
• Test and validate a potential deal thesis
• Learn due diligence activities necessary to test an investment thesis
• Develop synergy estimates
• Identify key risk issues to be investigated in due diligence
• Develop a due diligence plan

Postdeal Integration
• Develop a strategy for successful integration
• Manage postmerger integration with a focus on shareholder value
• Understand the decisions and processes that impact the new organization’s strategy, structure, and culture

FACULTY

Merle Erickson
Professor of Accounting, Chicago Booth

Gregory D. Bunch
Adjunct Professor of Entrepreneurship, Chicago Booth

Laura M. Born
Adjunct Professor of Finance, Chicago Booth

John Hand
Visiting Professor of Accounting, Chicago Booth

Stephen Morrissette
Visiting Professor of Business Administration, Chicago Booth

Note: Program and instructors are subject to change.

PROGRAM DETAILS

DATES
November 8–19, 2021

All in-person programs will adhere to Chicago Booth’s on-campus safety guidelines.

Please visit: ChicagoBooth.edu/ExecEdFAQ for additional information.

PROGRAM FORMAT

In-Person

LOCATION
Chicago Booth Gleacher Center
450 N. Cityfront Plaza Dr
Chicago, IL 60611

INVESTMENT
$10,950 USD

LEARN MORE
ChicagoBooth.edu/MA

CONTACT US: +1 312.464.8732
PRIVATE WEALTH MANAGEMENT (PWM)

This program provides an integrated and strategic approach to wealth management specifically for high-net-worth individuals and families. The cornerstones of successful wealth management are: management of the economic engine, control of costs, effective governance, and the expression and transfer of personal and family values. Participants gain tools to evaluate each of these cornerstones to design a personalized family wealth strategy and supporting infrastructure that they can implement.

WHO SHOULD ATTEND?

This program is for individuals and families, in the US or international, with $10 million (USD) or more in investable assets who have built wealth in this generation, have inherited family wealth, or are contemplating or have recently experienced a liquidity event. Family office executives may attend with principal family members, but the course is closed to all other financial services professionals.

ENROLLMENT REQUIREMENTS

Completed applications should be submitted as early as possible. Candidates will be notified of acceptance within one week. Application does not guarantee admission; candidates will be selected on their ability to benefit from, and contribute to, the program and valuable peer-learning environment.

PROGRAM BENEFITS

By attending this program, you will:

• Clarify your family and financial goals
• Design a strategy to preserve and manage your wealth
• Oversee financial advisors with greater confidence, accountability, and results

PROGRAM OUTLINE

You will learn data-driven, tested, and actionable frameworks:

• Learn the value drivers for preserving and growing wealth and how to use them, wherever in the world you reside
• Define your financial and family objectives within a comprehensive family enterprise management strategy that is consistent with your business, family values, and personal circumstances
• Explore family purpose and values within the context of a family enterprise
• Examine real estate as an important asset-class complement to equities and fixed income
• Select an investment strategy that is realistic, prudent, tax-efficient, and actionable given the time and resources you have to commit
“The course provided the perfect launch platform for setting my financial objectives and beginning the exercise of deciding on investment strategies and confronting the overall wealth management challenge.”

GUILLAUME CUVELIER
FOUNDER AND FORMER CEO, SVEDKA VODKA

PROGRAM OUTLINE (CONTINUED)

• Learn the differences among the investment, brokerage, and wealth management industries, and their complex relationships and incentive systems
• Decide how to evaluate, select, and oversee the firms and individual advisors who are right for you and your family
• Build performance evaluation, good reporting, and accountability into your relationships with your advisors
• Learn how trusts and other sophisticated planning instruments can reduce tax exposure, protect privacy, provide flexibility, and serve a family’s many generations without potentially spoiling them
• Explore governance systems that help your family to steward assets wisely and encourage your family members to flourish
• Finish the program with a list of action items that will impact your wealth management strategy

FACULTY

John C. Heaton
Joseph L. Gidwitz Professor of Finance, Chicago Booth

Steven N. Kaplan
Neubauer Family Distinguished Service Professor of Entrepreneurship and Finance and Kessenich E.P. Faculty Director at the Polsky Center for Entrepreneurship and Innovation, Chicago Booth

Stuart E. Lucas
Co-Managing Partner and Chief Investment Officer, Wealth Strategist Partners, LLC

Kathleen Fitzgerald
Adjunct Associate Professor of Strategic Management, Chicago Booth

Sara Hamilton
Founder and CEO, Family Office Exchange (FOX)

Howard M. Helsinger
Partner, Sugar Felsenthal Grais & Helsinger LLP

Stephen R. Quazzo
Cofounder and CEO, Pearlmark

Note: Program and instructors are subject to change.

PROGRAM DETAILS

DATES
October 18–22, 2021
All in-person programs will adhere to Chicago Booth’s on-campus safety guidelines.

Please visit: ChicagoBooth.edu/ExecEdFAQ for additional information.

Application required. Visit ChicagoBooth.edu/PWM to apply.

PROGRAM FORMAT

In-Person

SCHEDULE
Program starts at 1 p.m. on Monday and finishes by 3 p.m. on Friday

INVESTMENT
$11,800
(accommodations not included)

LOCATION
Chicago Booth
Gleacher Center
Chicago

LEARN MORE
ChicagoBooth.edu/PWM

CONTACT US: +1 312.464.8732 17
In the era of COVID-19, the only certainty is uncertainty. Markets have rebounded from their initial crash earlier in the year, but the global economy remains fragile. Taxes are likely to go up in the coming years in response to rising deficits. How should families manage through the turbulence? In this program, you'll gain wealth planning essentials to navigate these uncertain times.

WHO SHOULD ATTEND?

This program is for wealth owners only, with financial assets of US $10 million or more. Single family office executives may attend with principal family members, but other financial advisers may not attend.

ENGAGE YOUR FAMILY

Members of the same family can derive considerable benefit from taking this program together. The program provides a foundation for continued productive dialogue well into the future. It also can bring together family members from different generations in an environment where they can explore and validate different perspectives. To attend as a family, contact us for a simple group-registration process.

EXCLUSIVE OPPORTUNITY TO NETWORK WITH OTHER WEALTH OWNERS

This program provides an opportunity to share experiences, express ideas, and connect with your peers. Because some of the most valuable learning in the course takes place in sharing experiences, we create a confidential and solicitation-free environment. All participants must sign a confidentiality agreement before joining the course.

FACULTY

Stuart Lucas
Co-Managing Partner and Chief Investment Officer, Wealth Strategist Partners, LLC
PROGRAM BENEFITS
By attending this program, you will:
• Learn how to take charge of your wealth management
• Gain a strategic wealth management framework and the eight principles that act as guideposts for implementing the framework
• Understand how to incorporate individual and family values in effective wealth planning, creating shared purpose, and strategic philanthropy
• Examine different approaches taxable investors can take to capture value, from simple to complex
• Draw important lessons from successful multigenerational families

PROGRAM OUTLINE
Week One Sessions
• Strategic wealth management framework
• Picking your financial objectives
• Managing a taxable investor’s balance sheet
• Investment strategy 1
• Measuring the trade-offs: eat well or sleep well
• Investment strategy 2

Week Two Sessions
• Risk-management case studies
• Building a vision for your wealth and family
• Planning the next chapter: liquidity events and generational transition
• Strategic philanthropy
• Rethinking your financial adviser’s value proposition
• Five lessons from successful multigenerational families

PROGRAM DETAILS
DATES
This program is held in a live-online format, which entails multiple virtual sessions that span two weeks.
Check back soon for 2022 dates.

PROGRAM FORMAT
Live-Online

PROGRAM DURATION
Two weeks, 1–3 hours per week

PROGRAM SCHEDULE
Live sessions are held three times a week for two weeks, from 9–11:30 a.m. CT (2 p.m. GMT/3 p.m. WAT) on Monday, Wednesday, and Friday.
View the schedule here.

INVESTMENT
Full Program Experience: $4,500 USD (includes all sessions plus two small discussion groups)
Condensed Program Experience: $3,500 USD (includes all sessions)

LEARN MORE
ChicagoBooth.edu/WPE

CONTACT US: +1 312.464.8732
WHO SHOULD ATTEND?

This program is for experienced financial professionals from a variety of backgrounds and business models—including independent advisors, investment consultants, national and regional broker-dealer representatives, and bank/trust employees. It is open to those who have submitted a CIMA certification program application.

STEPS TO CERTIFICATION

Step 1: Submit CIMA certification program application, with fee, to the Investments & Wealth Institute®, and pass a comprehensive background check performed by Institute staff. The application is valid for two years from the date it is accepted by the Institute.

Step 2: Complete Booth education program. Fees are set by and payable to Booth. Booth will notify the Institute of candidates who have successfully completed the education program.

Step 3: Pass certification examination after successfully completing the education program. The certification examination is administered at local testing centers. A candidate may sit for this examination as often as necessary, but retesting fees apply, and there is a 30-day wait period between exam attempts.

Step 4: Demonstrate a minimum of three full years of verified professional experience in financial services or related industry, pass a second background check, complete a license agreement, and agree to adhere to the Institute’s Code of Professional Responsibility and Rules and Guidelines for the Use of the Marks.

If you have not yet begun the CIMA certification process or would like more information about the Investments & Wealth Institute’s advanced certification qualifications, please contact the Investments & Wealth Institute directly at +1 303.770.3377 or visit investmentsandwealth.org.

FORMAT

Combination of live-online, on-demand, and optional exam prep workshop
“Robust curriculum, thoughtfully designed, and masterfully taught. Thank you, Chicago Booth! You have more than exceeded my expectations!”

ERA YOO
CIMA®, SVP, NORTHERN TRUST

PROGRAM OUTLINE

Foundations (Live Online and Recorded)
- Module 1: Time Value of Money
- Module 2: Calculating Realized Returns
- Module 3: Statistics and Probability
- Module 4: Risk and Return

Course Content (On Demand)
- Module 5: Portfolio Theory
- Module 6: Capital Asset Pricing Model (CAPM), Multifactor Models
- Module 7: Behavioral Finance, Market Efficiency, Market Anomalies
- Module 8: Performance Measurement, Tax Efficient Strategies, Socially Responsible Investing
- Module 9: Applied Economics, Global Capital Markets History and Valuation
- Module 10: Fixed Income
- Module 11: Alternative Investments
- Module 12: Hedge Funds, Portfolio Construction, and Consulting Process

Weekly Review and Problem-Solving Sessions (Live Online and Recorded)
- Held once per week during Modules 5–12

Chicago Booth Exam (Online)
- The Booth exam opens online after the in-person workshop concludes
- The exam consists of problem solving and multiple choice questions
- Candidates must pass the Chicago Booth exam before taking the CIMA certification exam

Recommended: Chicago Booth CIMA CE Workshop
- Intensive two-day review course for the CIMA Certification Exam

FACULTY

John C. Heaton
Joseph L. Gidwitz Professor of Finance, Chicago Booth; Cofaculty Director for CIMA Education Program

Kathleen Fitzgerald
Adjunct Associate Professor of Strategic Management, Chicago Booth; Cofaculty Director for CIMA Education Program

Veronica Guerrieri
Ronald E. Tarrson Professor of Economics and Willard Graham Faculty Scholar, Chicago Booth

Lubos Pastor
Charles P. McQuaid Professor of Finance and Robert King Steel Faculty Fellow, Chicago Booth

Devin G. Pope
Professor of Behavioral Science and Economics and Robert King Steel Faculty Fellow, Chicago Booth

Pietro Veronesi
Deputy Dean for Faculty and Chicago Board of Trade Professor of Finance, Chicago Booth

Ira S. Weiss
Clinical Professor of Accounting and Entrepreneurship, Chicago Booth

John A. Nersesian, CIMA®, CPWA®, CIS, CFP*
Head of Advisor Education, PIMCO

PROGRAM DETAILS

DATES
September 8–December 3, 2021

PROGRAM FORMAT
Live-Online and pre-recorded sessions, plus optional CE Prep Workshop

PROGRAM DURATION
12 weeks plus the Certification Exam Prep Workshop

WORKSHOP LOCATION
Online

INVESTMENT
$4,950 USD (accommodations not included). Application required. Visit investmentsandwealth.org to apply to the certification program.

LEARN MORE
ChicagoBooth.edu/CIMA

CE CREDIT
This program is approved for 28 hours of CE credit for CFP® certification. The Investments & Wealth Institute is a CE Quality Partner of CFP Board and the sponsor of the education.
Who should attend?

This program is for wealth managers who advise high-net-worth clients. Five years of relevant experience and pre-study educational components are required.

Steps to certification

The CPWA certification program requires that candidates meet all eligibility requirements.

Step 1: Submit CPWA certification program application to the Investments & Wealth Institute*

Step 2: Complete pre-study educational component

Step 3: Attend in-class education program at Booth

Step 4: Pass comprehensive examination

Step 5: Provide compliance disclosure, complete license agreement, and pay initial certification fee

If you have not yet begun the CPWA certification process or would like more information about the Investments & Wealth Institute’s advanced certification qualifications, please contact the Investments & Wealth Institute directly at +1 303.770.3377 or visit investmentsandwealth.org.

An advanced credential created specifically for wealth managers who work with high-net-worth individuals, focusing on the life cycle of wealth: accumulation, preservation, and distribution. Candidates who earn the certification understand how to develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth.
“The CPWA® program is the perfect complement to the CIMA® program—the former adding practical wealth management strategies atop the latter’s theoretical and math-laden framework.”

RICK SCHULTZ  
CIMA®, CPWA®, CEP, AIF. SENIOR VICE PRESIDENT—INVESTMENTS, UBS FINANCIAL SERVICES

PROGRAM DETAILS

DATES
March 20–24, 2022  
June 12–16, 2022  
September 18-22, 2022

Sessions begin at 7:45 a.m. Monday and end on Thursday evening. There is an optional Sunday evening session.

Application required.  
Visit investmentsandwealth.org

For travel planning and more, visit ChicagoBooth.edu/ExecEdFAQ

INVESTMENT
$6,995

Fee includes accommodations, tuition, all meals Monday through Thursday, and educational materials. Visit investmentsandwealth.org for the most up-to-date information.

LOCATION
Chicago Booth  
Gleacher Center  
Chicago

LEARN MORE
ChicagoBooth.edu/CPWA

PROGRAM CORE TOPIC LIST

Part I: Human Dynamics  
• Section 1: Ethics  
• Section 2: Behavioral finance  
• Section 3: Family dynamics

Part II: Wealth Management—Technical Design  
• Section 4: Tax planning  
• Section 5: Portfolio management  
• Section 6: Risk management and asset protection

Part III: Legacy Issues  
• Section 7: Charitable giving and endowments  
• Section 8: Estate issues and wealth transfer

Part IV: Specialty Client Services  
• Section 10: Planning for executives  
• Section 11: Planning for closely held business owners  
• Section 11: Retirement management

FACULTY

John C. Heaton  
Joseph L. Gidwitz Professor of Finance, Chicago Booth

Merle Erickson  
Professor of Accounting, Chicago Booth

Lubos Pastor  
Charles P. McQuaid Professor of Finance and Robert King Steel Faculty Fellow, Chicago Booth

Kim Kamin  
Principal, Gresham Partners, LLC

John Nersesian, CIMA®, CPWA®, CIS, CFP®  
Head of Advisor Education, PIMCO

Note: Program and instructors are subject to change.
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Andreas Angelopoulos
Program Director, Oxford Chicago Valuation Program; Associate Fellow, Saïd Business School, University of Oxford

Oxford Chicago Valuation Program
- MSc, Columbia University; MBA, Chicago Booth
- Areas of primary interests include: venture capital, private equity, capital raising, and corporate and investment valuation

Susan Lucia Annunzio
President and CEO, Center for High Performance

The Executive Program for Prospective CFOs
The Latin American CFOs’ Executive Program
- Globally recognized speaker and thought leader on shaping and maintaining high-performance business environments
- Author of prominent books including Contagious Success, voted Fast Company’s Reader’s Choice in January 2005

Philip G. Berger
Wallman Family Professor of Accounting, Chicago Booth

Financial Analysis for Nonfinancial Managers
- PhD and MBA, University of Chicago
- Previous experience as faculty at MIT Sloan and the Wharton School, where he won every MBA teaching award
- Areas of primary interest include firm valuation, firm diversification, effects of accounting regulations, organizational design, and corporate governance

Laura M. Born
Adjunct Professor of Finance, Chicago Booth

Mergers and Acquisitions
- MBA in finance and accounting with honors from Chicago Booth
- Held the title of managing director of investment banking at JPMorgan Chase & Co.
- Chair of the board of trustees for the Columbia Acorn and Wanger Mutual Funds
- Member of board of directors and chair of the audit committee of Carlson Inc., and member of the advisory board of directors for Driehaus Capital Management
Gregory D. Bunch
Adjunct Professor of Entrepreneurship, Chicago Booth

The Executive Finance Program
The Executive Program for Prospective CFOs
The Latin American CFOs’ Executive Program
Mergers and Acquisitions
- MDiv, Harvard University
- Cofounded a healthcare software startup in the Bay Area and was a partner at Brandtrust, a brand strategy consultancy
- Works with Fortune 50 companies, family businesses, and startups in the areas of innovation and strategy
- Served on corporate boards for financial, marketing, and healthcare firms

John Burrows
Senior Lecturer in Leadership, the University of Chicago Harris School of Public Policy

The Latin American CFOs’ Executive Program
- PhD in behavioral science, University of Chicago; MBA, Chicago Booth
- Teaches general management, leadership, and negotiations for Chicago Booth Executive Education
- Previously, served as partner with Accenture and held senior roles in sales and marketing at enterprise software companies including Siebel and Oracle
- Teaching and research interests include organizational design, workforce analytics, social network analysis, and social capital

Hans B. Christensen
Professor of Accounting and David G. Booth Faculty Fellow, Chicago Booth

Financial Analysis for Nonfinancial Managers
- PhD in accounting, Manchester Business School, United Kingdom
- Areas of research include international accounting harmonization, debt contracting, and transparency regulation in financial and nonfinancial markets
- Professional experience includes auditing financial statements and working on complex deals such as M&A transactions at PricewaterhouseCoopers (PwC)

Jean-Pierre Dubé
James M. Kilts Distinguished Service Professor of Marketing, Chicago Booth

The Executive Program for Prospective CFOs
- MA and PhD in economics, Northwestern University
- Research interests include pricing, advertising, branding, digital marketing, retailing, and dynamic decision-making
- Received the class of 2016 Phoenix award for service to the student community, the 2008 Paul Green Award, and the 2005 Faculty Teaching Excellence Award for Chicago Booth
- Associate Editor at Marketing Science, Journal of Marketing Research, Management Science, and Quantitative Marketing and Economics

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Merle Erickson  
Professor of Accounting, Chicago Booth

Certified Private Wealth Advisor® (CPWA®) Certification  
Mergers and Acquisitions

- MBA, Arizona State University; PhD in accounting, University of Arizona
- Named one of Bloomberg Businessweek’s Outstanding Faculty at the University of Chicago and received (twice) the Outstanding Manuscript Award from the American Taxation Association
- Published work includes the widely used Taxes and Business Strategy textbook
- Has consulted periodically on complex GAAP and tax accounting issues, and his clients have included the US Department of Justice, the Internal Revenue Service, international investment banks, and a variety of Fortune 500 firms

Kathleen Fitzgerald  
Adjunct Associate Professor of Strategic Management, Chicago Booth

Certified Investment Management Analyst® (CIMA®) Certification  
Financial Analysis for Nonfinancial Managers  
Private Wealth Management

- MBA, University of Chicago
- Director of academic support, Executive MBA Program
- Teaching experience includes accounting, finance, taxation, and strategy at the University of Chicago and other universities in the US and Europe
- Professional experience includes auditing and tax consulting at Ernst & Young, LLP and forensic accounting consulting at Chicago Partners

Linnea Gandhi  
Adjunct Assistant Professor of Behavioral Science, Chicago Booth

The Latin American CFOs’ Executive Program

- MBA, University of Chicago Booth School of Business
- AB in social studies (psychology and philosophy), Harvard University
- Teaches Managerial Decision-Making, Choice Architecture in Practice, and Strategic Uncertainty at Chicago Booth
- Heads decision science at BehavioralSight, helping businesses integrate insights and methodologies from psychology and statistics into their research programs and corporate strategies

Veronica Guerrieri  
Ronald E. Tarrson Professor of Economics and Willard Graham Faculty Scholar, Chicago Booth

Certified Investment Management Analyst® (CIMA®) Certification

- PhD in economics, MIT
- Research associate of the National Bureau of Economic Research since 2013
- Consultant at the Federal Reserve Bank of Chicago since 2014
- Recipient of multiple awards including the Bernácer Prize in 2015 for the best European economist under 40 in macroeconomics and finance and the Excellence Award in Global Economic Affairs

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Charles J. Hadlock
Visiting Professor of Finance, Chicago Booth

The Latin American CFOs’ Executive Program
• PhD in economics, MIT
• Winner of the Merton Miller Prize awarded by the Journal of Business and the Michael Brennan Prize awarded by the Review of Financial Studies
• Frederick S. Addy Distinguished Chair in Finance at the Eli Broad College of Business at Michigan State University, recipient of the Executive MBA Teaching Award

Sara Hamilton
Founder and CEO, Family Office Exchange (FOX)

Private Wealth Management
• MBA, University of North Florida
• Founder of the premier family office community with 500-plus members in 26 countries
• One of the country’s leading spokespersons about private wealth management and the family enterprise concept

John Hand
Visiting Professor of Accounting, Chicago Booth

Mergers and Acquisitions
• PhD, University of Chicago
• Recipient of the 2019 UNC Kenan-Flagler Distinguished Research Award
• Served 20 years as a key business plan and valuation advisor to, and/or on the board of directors of six North Carolina-based startups, primarily in the medical device area

John C. Heaton
Joseph L. Gidwitz Professor of Finance, Chicago Booth

Certified Investment Management Analyst® (CIMA®) Certification
Certified Private Wealth Advisor® (CPWA®) Certification

Private Wealth Management
• PhD, University of Chicago
• Has earned numerous fellowships in economic research
• Previous experience as faculty at Northwestern Kellogg School of Management and MIT Sloan
• Research associate with the National Bureau of Economic Research

Howard M. Helsinger
Partner, Sugar Felsenthal Grais & Helsinger LLP

Private Wealth Management
• PhD in English literature, Princeton; JD, University of Chicago Law School
• Taught trusts and estates at the University of Chicago Law School from 1997 to 2016
• Concentrates his practice in estate planning and administration, probate, charitable planning, and trust and estate related litigation

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Tim Jenkinson
Professor of Finance and Head of the Finance Faculty, Saïd Business School, University of Oxford

Oxford Chicago Valuation Program
• One of the foremost academic experts on private equity, and a leading European expert on IPOs
• Well known for his ability to collect critical, previously inaccessible data

Kim Kamin
Principal, Gresham Partners, LLC

Certified Private Wealth Advisor® (CPWA®) Certification
• JD, University of Chicago Law School
• Fellow with the American College of Trust and Estate Counsel (ACTEC)
• Adjunct professor, Northwestern Pritzker School of Law (currently teaches estate planning in the LLM in tax program)
• Editorial advisory board, Trusts & Estates Magazine

Steven N. Kaplan
Neubauer Family Distinguished Service Professor of Entrepreneurship and Finance and Kessenich E.P. Faculty Director at the Polsky Center for Entrepreneurship and Innovation, Chicago Booth

The Executive Finance Program

The Executive Program for Prospective CFOs

Private Wealth Management
• PhD in business economics, Harvard University
• Published papers on LBOs and private equity that are the standard references in the field
• Fortune magazine referred to him as “probably the foremost private equity scholar in the galaxy”
• Named by Bloomberg Businessweek as one of the top 12 business school teachers in the country
• Started Booth’s New Venture Challenge, which has spawned more than 100 companies that have created more than $10 billion in market value
• Serves on the board of directors for Morningstar, Inc. and Zayo Group

Randall S. Kroszner
Deputy Dean for Executive Programs and Norman R. Bobins Professor of Economics, Chicago Booth

The Executive Program for Prospective CFOs

The Latin American CFOs’ Executive Program
• MA and PhD in economics, Harvard University
• Former governor of the Federal Reserve System and former member of the President’s Council of Economic Advisers
• Frequent commentator in the international media and advises financial institutions, government organizations, and central banks throughout the world
Christian Leuz  
*Joseph Sondheimer Professor of International Economics, Finance, and Accounting, Chicago Booth*

- The Executive Program for Prospective CFOs
- The Latin American CFOs’ Executive Program
  - PhD in business economics, Goethe University Frankfurt
  - Codirector of the Initiative on Global Markets
  - 2016 and 2014 Distinguished Contribution to the Accounting Literature Award
  - Recipient of additional awards and honors including the Humboldt Research Award and Wildman Medal Award
  - Research associate at the National Bureau of Economic Research

Stuart E. Lucas  
*Co-Managing Partner and Chief Investment Officer, Wealth Strategist Partners, LLC*

- Private Wealth Management
- Wealth Planning Essentials
  - MBA, Harvard Business School
  - Featured speaker around the world and author of *Wealth: Grow It and Protect It*, as well as numerous articles on wealth management, including “Pick Your Battles,” “The 50% Rule,” and “Managing Paradox”
  - Chartered Financial Analyst
  - Vice chair, Stuart Foundation
  - Investment committee chair, National Public Radio, Inc.

Lindsey Lyman  
*Clinical Assistant Professor of Entrepreneurship, Chicago Booth*

- The Executive Program for Prospective CFOs
- MBA, University of Chicago Booth School of Business
- Founder of Growth Studios, an innovation consultancy that helps companies innovate faster and build profitable new businesses
- Currently serves as a senior advisor to McKinsey & Company’s innovation and design practices after having spent a decade as a leader in McKinsey’s global innovation practice

Scott Meadow  
*Clinical Professor of Entrepreneurship, Chicago Booth*

- The Executive Finance Program
  - MBA, Harvard Business School
  - Designated by Bloomberg Businessweek’s “Guide to the Best Business Schools” as one of the outstanding entrepreneurial professors in the country
  - Twenty-five years of experience as a general partner with four venture capital and private equity firms, including William Blair Venture Partners, the Frontenac Company, the Sprout Group, and most recently, with the Edgewater Funds, where he remains a senior advisor

Stephen Morrissette  
*Visiting Professor of Business Administration, Chicago Booth*

- Mergers and Acquisitions
  - MBA in finance and strategy, the University of Chicago; PhD in entrepreneurial finance from Union University
  - CEO of several startup businesses
  - Strategic planning and M&A consultant and former corporate development/M&A executive officer

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John A. Nersesian, CIMA®, CPWA®, CIS, CFP®
Head of Advisor Education, PIMCO

Certified Investment Management Analyst®
(CIMA®) Certification
Certified Private Wealth Advisor®
(CPWA®) Certification
BS in business and economics, Lehigh University
• Previously served as managing director of wealth management services for Nuveen Investments
• Former chairman of the board, Investments & Wealth Institute
• Frequent speaker in the areas of investment consulting and financial planning, and contributor to a variety of media outlets

Lubos Pastor
Charles P. McQuaid Professor of Finance and Robert King Steel Faculty Fellow, Chicago Booth

Certified Investment Management Analyst®
(CIMA®) Certification
Certified Private Wealth Advisor®
(CPWA®) Certification
• PhD in finance, the University of Pennsylvania Wharton School
• Director of the Center for Research in Security Prices, the Fama-Miller Center for Research in Finance, and the American Finance Association
• Member of the Bank Board of the National Bank of Slovakia

Devin G. Pope
Professor of Behavioral Science and Robert King Steel Faculty Fellow, Chicago Booth

Certified Investment Management Analyst®
(CIMA®) Certification
• PhD in economics, UC Berkeley
• Published work in top economics outlets such as the American Economic Review, Quarterly Journal of Economics, Journal of Political Economy, and Review of Economic Studies
• Studies how psychological biases play out in field settings and economic markets

Stephen R. Quazzo
Cofounder and CEO, Pearlmark

Private Wealth Management
• MBA, Harvard University
• Cofounder and CEO of Pearlmark, which has made more than 540 office, industrial, retail, multifamily, and mezzanine loan investments nationwide, representing a gross investment of more than $13.3 billion
• Previously served as president of Equity Institutional Investors, Inc., a subsidiary of investor Sam Zell’s private holding company, as well as a vice president in the Real Estate Department of Goldman Sachs
• Serves on the board of directors for Marriott Vacations Worldwide Corp. and Phillips Edison & Company

Haresh Sapra
Charles T. Horngren Professor of Accounting, Chicago Booth

Financial Analysis for Nonfinancial Managers
Chicago Booth Approach to Finance
• PhD in business administration, University of Minnesota
• Published in the Accounting Review, Journal of Accounting Research, and Games and Economic Behavior
• Teaches MBA electives on mergers and acquisitions and corporate restructuring
• Teaches PhD course on analytical accounting research

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Douglas J. Skinner  
*Deputy Dean for Faculty and Eric J. Gleacher Distinguished Service Professor of Accounting, Chicago Booth*

The Executive Finance Program
Oxford Chicago Valuation Program
- MA and PhD in applied economics: accounting and finance, University of Rochester
- Named one of the top business school professors in the world in the *Financial Times* Global MBA Rankings in 2010
- A leading expert in corporate disclosure practices, corporate financial reporting, and corporate finance, with a focus on payout policy

Amir Sufi  
*Bruce Lindsay Professor of Economics and Public Policy, Chicago Booth*

The Executive Finance Program
- PhD in economics, MIT
- Awarded the 2017 Fischer Black Prize by the American Finance Association, given biennially to the top financial economics scholar under age 40
- Coauthor of *House of Debt: How They (and You) Caused the Great Recession, and How We Can Prevent It from Happening Again*
- Codirector of the Corporate Finance Program at the National Bureau of Economic Research

Pietro Veronesi  
*Deputy Dean for Faculty and Chicago Board of Trade Professor of Finance, Chicago Booth*

Certified Investment Management Analyst® (CIMA®) Certification
- PhD in economics, Harvard University
- Former director of the American Finance Association, research associate of the National Bureau of Economic Research, and research fellow of the Center for Economic Policy and Research
- Recipient of the McKinsey Award for Excellence in Teaching
- Awarded numerous prizes for research such as the AQR Insight Award and two Smith Breeden Prizes

Ira S. Weiss  
*Clinical Professor of Accounting and Entrepreneurship, Chicago Booth*

Certified Investment Management Analyst® (CIMA®) Certification
- MBA and PhD, Chicago Booth
- Specializes in tax strategy, financial accounting, entrepreneurship, and private equity investing
- Partner at Hyde Park Venture Partners, a Chicago-based venture capital firm
- Research and published work has appeared in the *Wall Street Journal* and on CNN

Hal Weitzman  
*Adjunct Associate Professor of Behavioral Science, Chicago Booth*

The Executive Program for Prospective CFOs
- Teaches three Chicago Booth MBA classes on persuasion
- Executive director for intellectual capital at Chicago Booth; editor in chief of *Chicago Booth Review* and host of *The Big Question* video series
- Reporter and editor at the *Financial Times* from 2000 to 2012, reporting from London, South America, and Chicago

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Programs are designed for senior-level executives in both functional and general management positions. These leaders may be transitioning into new roles, looking to develop in a specific functional area, or seeking to expand their leadership skills. They may manage teams or contribute on an individual basis, managing or influencing stakeholders across an organization.

**MANAGEMENT LEVEL**
- Senior Management
- Upper-Middle Management
- Middle Management
- Other

**INDUSTRY**
- Manufacturing
- Retail
- Utilities
- Chemicals
- Financial Services
- Construction
- Healthcare
- Technology
- Other

**REGION**
- North America
- EMEA
- Asia and Oceania
- South America

Data reflects participants attending finance programs as of September 2019.
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**FIRST** to originate the study of modern finance, develop the concept of social capital, redefine the science of the stock market, and pioneer quantitative marketing
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