

# Evidence-based Investing: Improved Performance with Lower Fees

As dental professionals, our goal is to deliver exceptional patient care. One of the ways we accomplish this is by utilizing materials and techniques that have been academically researched and tested. Why not apply the same evidenced-based approach to your investment strategies and financial well-being?



Dr. Little's topics are "best sellers" for sure! He always fills the room with dentists who are curious to learn whether they have been put at risk and how they can avoid those risks!

Cathy Levering  
Executive Director  
Sacramento District Dental Society

Maximizing returns by trying to "beat the market" is elusive even for professional fund managers and advisors. The sad reality is the majority of actively-managed portfolios are unable to outperform the market averages over time. When advisor and management fees are deducted, outperforming the market becomes even more elusive. Over time, these fees and commissions can cost thousands of dollars.

Explore current academic research and evidence-based investing strategies to understand how a more passively-managed, low-cost strategy beats most actively-managed portfolios over time. Index funds and exchange-traded funds (ETFs) are a key component of this strategy and will be discussed in detail.

Additionally, by determining proper asset allocation and rebalancing techniques, it is possible to beat most actively-managed portfolios in a more cost-effective manner.

## COURSE OBJECTIVES

- Understand the difference between active versus passive investment strategies
- Discover why most fund managers and advisors cannot beat market averages over time
- Review current academic research to compare active versus passive investing strategies
- Learn asset allocation strategies and rebalancing techniques
- Understand the potential disadvantages of utilizing a passive investment strategy

### Suggested Format:

Half-day, Full-day, After-dinner, Keynote

**Audience:** Ideal for the entire dental team

