

Maximizing investment returns by trying to actively “beat the market” is elusive even for professional fund managers and advisors.



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
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Maximizing investment returns by trying to actively “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 market averages over time and often lead to higher financial fees. The end result is often lower investment returns.

A more prudent strategy could be an evidence-based, passively managed approach to investing. After all, we deliver quality care to our patients by utilizing materials and techniques that have been academically researched and tested over time. Why not apply the same evidenced-based approach to your investment strategies and financial well-being?

This course explores how a more passively managed strategy beats most actively managed portfolios over time. Index funds and exchange-traded funds (ETFs) are key components of this strategy along with appropriate asset allocation, rebalancing and risk reduction techniques.

COURSE OBJECTIVES

- Compare active versus passive investing strategies
- Understand why most active strategies struggle to outperform market averages
- Learn asset allocation strategies and rebalancing techniques while managing risk
- Develop strategies for college, retirement and succession planning
- Discover the potential pitfalls of utilizing a passive investing strategy

Suggested Format:

Half-day, After-dinner

Audience: Ideal for the entire dental team

Individual investors and professionals who actively try to “time” the market to achieve higher returns rarely succeed!