



**Community Bank Investments School  
CU Denver Business School - May 19-23, 2019**

Sunday, May 19	Monday, May 20	Tuesday, May 21	Wednesday, May 22	Thursday, May 23
	7:15-7:45 am Breakfast			
	<b>7:45-9:15 am</b> Introduction to the Bloomberg Lab Chris Nelson, John Nelson & Jerry Beers	<b>8:00-9:15 am</b> Sector Analysis 2 Todd Taylor	<b>8:00-9:15 am</b> Analyzing Municipal Bonds 2 Josh Kiefer	<b>8:00-9:15 am</b> Regulatory View of Community Bank Risk Management Chasity Dschaak
	<b>9:30-10:45 am</b> Introduction to Mortgage-Backed Securities Chris Nelson & Randy Woodward	<b>9:30-10:45 am</b> Portfolio Analytics 3 Chris Nelson, John Nelson & Jerry Beers OR Elective: Commercial Mortgage-Backed Securities (Basic) Jason Mork	<b>9:30-10:45 am</b> Portfolio Analytics 4 Chris Nelson, John Nelson & Jerry Beers OR SBA Securities Jason Mork	<b>9:30-10:45 am</b> Case Study Presentations Chris Nelson
	<b>11:00 am-12:15 pm</b> Portfolio Analytics 2 Chris Nelson, John Nelson & Jerry Beers OR Introduction to Collateralized Mortgage Obligations (CMOs) Randy Woodward	<b>11:00 am-12:15 pm</b> Portfolio Analytics 3 Chris Nelson, John Nelson & Jerry Beers OR Elective: Commercial Mortgage-Backed Securities (Intermediate) Jason Mork	<b>11:00 am-12:15 pm</b> Portfolio Analytics 4 Chris Nelson, John Nelson & Jerry Beers OR SBA Securities Jason Mork	<b>11:00 am-12:15 pm</b> Developing an Effective Investment Policy Chasity Dschaak & Chris Nelson
<b>12:00-1:00 pm</b> Registration	<b>12:15-1:00 pm</b> Lunch			
<b>1:00-2:00 pm</b> Bond Basics & the Pricing of Fixed Income Securities Chris Nelson	<b>1:15-2:30 pm</b> Portfolio Analytics 2 Chris Nelson, John Nelson & Jerry Beers OR Elective CMOs (Intermediate) Randy Woodward	<b>1:15-2:30 pm</b> Analyzing Municipal Bonds 1 Josh Kiefer	<b>1:15-2:30 pm</b> What Securities/Structures Are High Risk for Community Banks? Blake Scharlach & Todd Wentz	
<b>2:00-3:15 pm</b> Economics & Yield Curve Analysis Tim Koch	<b>2:45-4:00 pm</b> Bloomberg: Beyond Bond Analytics Randy Woodward	<b>2:45-4:00 pm</b> Portfolio Optimization Strategies Blake Scharlach & Todd Wentz	<b>2:45-4:00 pm</b> Effective Use of Interest Rate Swaps Blake Scharlach & Todd Wentz	
<b>3:30-5:00 pm</b> Introduction to Bloomberg: Uses & Abuses Randy Woodward	<b>4:15-5:30 pm</b> Sector Analysis 1 Todd Taylor	<b>4:15-5:30 pm</b> Case Study: Assembling a High-Performance Bond Portfolio Chris Nelson	<b>4:15-5:30 pm</b> Bond Portfolio, Funding Alternatives & Liquidity Chris Nelson	
<b>5:00-5:45 pm</b> Orientation & Dinner	Curriculum Subject to Change			
<b>6:00-7:15 pm</b> U.S. Government & Agency Securities Chris Nelson & Randy Woodward				