



**Community Bank Investments School (Room 1800/Room 1200)
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			
	8:00-9:15 am Introduction to the Bloomberg Lab <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers	8:00-9:15 am Sector Analysis 2 Todd Taylor	8:00-9:15 am Analyzing Municipal Bonds 2 Josh Kiefer	8:00-9:15 am Regulatory View of Community Bank Risk Management Chasity Dschaak
	9:30-10:45 am Introduction to Mortgage-Backed Securities Chris Nelson & Randy Woodward	9:30-10:45 am Portfolio Analytics 3 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR Elective: Commercial Mortgage-Backed Securities (Basic) Jason Mork	9:30-10:45 am Portfolio Analytics 4 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR SBA Securities Jason Mork	9:30-10:45 am Case Study Presentations Chris Nelson
	11:00 am-12:15 pm Portfolio Analytics 2 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR Introduction to Collateralized Mortgage Obligations (CMOs) Randy Woodward	11:00 am-12:15 pm Portfolio Analytics 3 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR Elective: Commercial Mortgage-Backed Securities (Intermediate) Jason Mork	11:00 am-12:15 pm Portfolio Analytics 4 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR SBA Securities Jason Mork	11:00 am-12:15 pm Developing an Effective Investment Policy Chasity Dschaak & Chris Nelson
12:30-1:00 pm Registration	12:15-1:00 pm Lunch			
1:00-2:00 pm Bond Basics & the Pricing of Fixed Income Securities Chris Nelson	1:15-2:30 pm Portfolio Analytics 2 <i>Room 1200 (Lab)</i> Chris Nelson, John Nelson & Jerry Beers OR Elective CMOs (Intermediate) Randy Woodward	1:15-2:30 pm Analyzing Municipal Bonds 1 Josh Kiefer	1:15-2:30 pm What Securities/Structures Are High Risk for Community Banks? Blake Scharlach & Todd Wentz	
2:00-3:15 pm Economics & Yield Curve Analysis Tim Koch	2:45-4:00 pm Bloomberg: Beyond Bond Analytics Randy Woodward	2:45-4:00 pm Portfolio Optimization Strategies Blake Scharlach & Todd Wentz	2:45-4:00 pm Effective Use of Interest Rate Swaps Blake Scharlach & Todd Wentz	
3:30-5:00 pm Introduction to Bloomberg: Uses & Abuses Randy Woodward	4:15-5:30 pm Sector Analysis 1 Todd Taylor	4:15-5:30 pm Case Study: Assembling a High-Performance Bond Portfolio Chris Nelson	4:15-5:30 pm Bond Portfolio, Funding Alternatives & Liquidity Chris Nelson	
5:00-5:45 pm Orientation & Dinner	5:45-7:00 pm Reception Rio Grande - 1525 Blake St, Denver (walking distance from Business School)	Curriculum Subject to Change		
6:00-7:15 pm U.S. Government & Agency Securities Chris Nelson & Randy Woodward				