



Author and veteran financial analyst, Peter J. Klein, CFA, is available as a featured speaker with the release of the 2<sup>nd</sup> edition of *Getting Started in Security Analysis* - an essential guide that looks at security analysis and how to use it during tough financial times. Klein offers expert insight combined with “user friendly” presentation skills to assist individuals and business owners as they navigate the current economic climate.



Peter J. Klein, CFA

Klein illustrates how small business owners and professionals can better evaluate their investment management portfolios and strengthens their understanding of the intricacies of the economy and how it affects their investment strategies. In his discussion, Klein details the key factors for identifying good investments through rigorous research:

- ◆ The PATIROC System---a proprietary system for identifying the characteristics of good investments:
  - People
  - Assets
  - Technology
  - International Strategy
  - Return
  - Operations
  - Cost Effective Management
- ◆ An Investment Checklist
- ◆ The DuPont Equation for understanding Return on Equity (ROE)
- ◆ A Calendar of Economic Indicators
- ◆ The Dividend Discount Method for calculating value of an individual security
- ◆ The 4 Step Investment Management Process
- ◆ Formulating an Investment Policy Statement
- ◆ Asset Allocation Model—Strategic or Tactical?
- ◆ The Core-Satellite Implementation Platform
- ◆ Water Sector Specialty - Discusses complete value chain of the water industry from municipal water companies, infrastructure companies (pump manufacturers, pipeline manufacturers, etc...) and environmental compliance companies
- ◆ Klein’s Current Assessment of the Economy and Market— Best Strategy for Today

For more information or to schedule Peter J. Klein, CFA as a speaker, contact Hillary Needle Events, Inc. at (516) 993-4056 or email, [hillaryneedle@cs.com](mailto:hillaryneedle@cs.com)

Peter J. Klein, CFA is a Senior Vice President of Investments with UBS Financial Services USA (Melville, NY) where he and his team develop financial plans for individuals and small institutions and proactively steward their capital through the capital markets. Klein holds a BA in Economics and an MBA in Finance, is a member of the CFA Institute, the New York Society of Security Analysts, serves as President of the Clare J. Friedlander Family Foundation and sits on several not-for-profit boards.