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For distribution to relevant parties within your firm

**BULLETIN #3666**  
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## **Educational Web Cast for Branch Managers & Advisors**

### **Advisor Managed Discretionary Portfolios**

As Fee based business continues to grow, the assets held in Advisor Managed portfolios or in-house portfolio management has seen significant increase. According to Investor Economics, Advisor Managed business represents over \$25 billion in assets and is growing annually in excess of 38%.

Our next web cast, following last month's focus on all fee based services will focus on the specific requirements of Advisor Managed discretionary accounts and in-house portfolio management services.

We have invited, Edward J. Collins, CFA, Vice-President and Portfolio Manager for Wellington West Capital to share his insights and experience in managing the regulatory requirements of a discretionary business. We will review case examples and discuss branch management requirements for this service.

Our focus web cast on Advisor Managed Discretionary Portfolios will take place on September 11, 2007 at 4 pm EDT in English and Sept 12, 2007 at 4pm EDT in French. For those experiencing a scheduling conflict a replay of the web cast will be made available. The web cast will be 45 minutes in length and participants will be eligible for one hour of Continuing Education credit (CE Credit) which can be applied against fulfilling their compliance requirement.

To keep informed of upcoming Member Services events, simply subscribe to the IDA's e-publications service at [www.ida.ca](http://www.ida.ca) and select the following categories: "Adviser Educational Web Casts" and "Events – Educational Events and Seminars." E-publications is a free, self-managed system, whereby subscribers can change their selection criteria whenever and as many times as they want, making it a quick and easy way to receive information.

Additional information about the program as well as the Registration forms are available at [http://www.ida.ca/Media/Events\\_en.asp](http://www.ida.ca/Media/Events_en.asp)

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