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Inflation and Investing Strategies for Financial Planning

June 8, 2022 • 1:00 pm - 2:05 pm ET

Agenda

Review of Inflation From 1926-2021

- Annual Inflation Rate (Based on CPI) Bar Graphs
- Annual Inflation Rate (Line Graph)
- Federal Discount Rate Superimposed on CPI Line Graph Illustrating Correlation Between CPI and Interest Rate

Review of U.S. Interest Rate and Performance of U.S. Bonds

- Bar Graph of Aggregate Bond Performance With Line Graph of Annual Interest Rate (1948-2021)
- Division of Results Into Two Groups (1948-1981 and 1982-2021)
- Review of Investment Portfolios With Varying Degrees of Diversification

Comparison of Two Portfolios Over 50-Years

- Multi-Asset Portfolio vs. 2-Asset Portfolio
- Performance Review by Specific Asset Class (Gross and Inflation-Adjusted)
- Performance Review by Portfolio Type

Asset Class and Portfolio Performance During High and Low Inflation

- Review of Gross and Real Performance Over Past 50 Years
- Performance Review by Asset Class and Type of Portfolio
- Analysis of Portfolio Performance With and Without Commodities, Listing of Commodities Funds

Introduction to 7Twelve®, a Broadly Diversified Modern Portfolio

- Performance Evaluation of the 7Twelve Model® Over the Past 20 Years
- Low-Cost Versions of the 7Twelve® Model
- Review of Asset Class Performance ‘Horse Race’ Over the Past 20 Years

Learn how to build a diversified portfolio that is better equipped for higher inflation.

Inflation comes and goes. It has been very low for a number of years until 2021. Now, the specter of inflation is clear. Some asset classes thrive during inflationary periods. This course reviews U.S. inflation over the past 96 years and identifies diversified investment portfolios that have provided better ‘real’ performance during periods of higher inflation compared to simple stock and bond portfolios. This material will also provide detailed guidance on how to build a modern 12-asset class portfolio that has components that perform better during periods of higher inflation.

Learning Objectives

After attending this live webinar, you will be able to:

- define how inflation is measured.
- describe inflation over the past 9 decades.
- discuss methods to combat inflation in an investment portfolio.
- explain the correlation between inflation and interest rates.

To register, visit www.lorman.com/ID409931 or call 866-352-9539 • Tuition: $149 • Live Webinar ID: 409931

Printable registration form available upon request.

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Faculty

Craig L. Israelsen, Ph.D.

- Developer of the 7Twelve® portfolio
- Executive-in-Residence, Financial Planning Program, Utah Valley University
- Wrote monthly for Financial Planning Magazine for over 20 years
- Author of several books
- Previously on the faculty at University of Missouri (1991-2014) and Brigham Young University (2004-2013)
- Has published dozens of journal articles and hundreds of professional articles
- Can be contacted at Craig@7TwelvePortfolio.com or 801-489-4711

Continuing Education Credit

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