

# Benefits

- A natural venue for recognition amongst peers where many strategic partnerships are formed. Learn from fellow Morgan Stanley peers who understand the PM business.
- Complimentary or discounted industry research.
- Annual Forum brings together over 200 PMI members for three days of industry leading speakers, workshops, and networking. All speakers and presenters are chosen by Morgan Stanley peers to elevate a PM business.
- Monthly member-only national conference calls with thought leaders in finance. Recent speakers have include Ray Scalfani, John Tamny, David Kotok, Kassim Gaffar, Ben Hunt.
- An interactive website dedicated to providing members with leading edge professional development materials and access to a range of useful tools including newsletters from PMs across the country.
- PMI member access to the GIC's Asset Allocation Center (AAC) portfolio construction and asset allocation analytics tool to create customized, modular MS PowerPoint reports that are client ready and compliance approved.



## Annual Forum

PMI's Annual Forum is designed to allow Portfolio Managers to network, discuss, share, mingle, and learn via open forums, workshops, and presentations from leading industry experts ... and each other.

*The 2017 Forum will be May 10-12, 2017  
in Half Moon Bay, CA. · Ritz-Carlton Resort*

### Past Keynote Speakers Include:

- Dr. A. Gary Shilling
- David Kotok
- Walter Isaacson
- Danielle DiMartino
- Drew Brees
- Michael Dooley
- Peter Ricchiuti
- Scott Miner

PMI Annual PMI Forum offers CPM, CFP, CFA and CIMA continuing education credits

Learn More About PMI  
[www.pminstitute.org](http://www.pminstitute.org)



Created By:  
Morgan Stanley  
Portfolio Managers

Designed For:  
Morgan Stanley  
Portfolio Managers  
and their teams



# What is PMI?



*You are not alone.*

*The PMI Forum is the one event I attend each year where I get the input of the most talented Portfolio Managers sharing how they are dealing with their clients, their portfolios and their practices.*

*It's the best investment I make every year.*

**Jeff Gerson**

Executive Director - Morgan Stanley, New York, NY

The Portfolio Management Institute® (PMI) was founded in 2004 as an independent, firm-wide, membership supported association of Financial Advisors committed to discretionary portfolio management. PMI is the only organization of it's type and provides peer-led resources to every Morgan Stanley Portfolio Manager Member.

**Learn More About PMI**  
[www.pminstitute.org](http://www.pminstitute.org)

# Who can join?

Available to anyone with Portfolio Manager status within Morgan Stanley or a member of their team.



# What sets us apart?

PMI introduced the “Certified Portfolio Manager®” (CPM) certification, in conjunction with Columbia University, in 2008. The Annual PMI Forum offers CEUs for current CPM® designation holders.

Frequent peer-to-peer meetings on a local level to allow idea sharing by Portfolio Managers.

***All PMI membership dues, forum fees and related expenses are eligible for BDA/AFG reimbursement.***

