



Graham Rich

Rich joins with UTS in educational expansion

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INVESTOR STRATEGY NEWS

Graham Rich's Portfolio Construction Forum has expanded its reach in investor education with an arrangement with the University of Technology Sydney's former Paul Woolley Centre, now known as the UTS Investment Management Research Program.

The UTS program, still to be run by Professor Ron Bird, who set up the Paul Woolley Centre in Australia, includes an annual one-day conference followed by a one-day workshop, both in September, and a half-day workshop to take place on March 30. The workshop is the first to be held in collaboration with Portfolio Construction Forum.

Bird said in a note to participants, including practitioners, academics and researchers, that the UTS Business School would assume the responsibilities and functions of the Paul Woolley Centre, including the fostering of research on capital markets, superannuation, wealth management and funds management.

The expansion for the Forum follows its success in taking over the management and delivery of the Certified Investment management Analysts (CIMA) program from last year. This includes a one-week residential course.

Rich said that education was fundamental to the funds management industry going forward and his firm wanted to work with all organisations to advance the cause. "By collaborating with Ron [Bird] we can infiltrate the system from the top down... As I have said to ASIC: 'what is the requirement to be part of an investment committee?'... You are regulating the waiters but not the chefs."

New Zealand-born Rich, who moved to Australia in 1995 to set up what became Morningstar Australia, is hopeful that the UTS program will be expanded to New Zealand. Bird is also a part-time professor at the University of Waikato.

Rich said that formal structured education in the funds management industry was where research was 20 years ago. This was the decade for it to flourish with programs such as UTS's and CIMA's.

There has always been a strong educational element to the PWC's events, including detailed pre-conference notes and regular updates to Forum members.



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