

## Program Details

<b>Sponsor Name:</b>	Zeo Capital Advisors
<b>Program Name:</b>	How to Pick a Bond Fund: Identifying Hidden Costs and Misunderstandings
<b>CFP Board Program ID:</b>	224462
<b>Description:</b>	<p>This 1-hour program examines the most important overlooked considerations for anyone, regardless of experience level, who is responsible for selecting fixed income investments.</p> <p>We first discuss why the tried-and-true strategies that worked so well in the past may not be ready for the permanent change that has taken place in the last few years in how investors perceive fixed income risks. We then address the three biggest issues facing bond fund investors: the role fixed income plays in a portfolio, the age-old debate between active and passive management and the never-ending challenge of client communication. Within each of these areas, we analyze common metrics and assumptions that will help investors better evaluate and compare their bond fund options. We conclude by offering specific ways investors can adjust their due diligence processes to identify hidden costs and to reposition their portfolios both to better meet their expectations in current markets and to be more resilient longer-term.</p>
<b>Learning Objectives:</b>	<ol style="list-style-type: none"><li>1. How to recognize and compare risks across multiple bond fund offerings.</li><li>2. Hidden costs associated with different fund structures.</li><li>3. Common misunderstandings that can lead clients astray.</li></ol>
<b>Level of Complexity:</b>	Intermediate
<b>Ethics:</b>	No
<b>Method of Delivery:</b>	Live
<b>Start Date:</b>	02/22/2016
<b>End Date:</b>	12/31/2016
<b>Program Status:</b>	Active
<b>Total Hours Requested:</b>	1.00
<b>Total Hours Granted:</b>	1.00