“Integrated Wealth Management: Past, Present & Future”
By Jean Brunel, CFA, Managing Principal of Brunel Associates

Date: Thursday, 30 October 2008
Time: 12:30pm – 2pm (registration starts 12pm onwards)
Venue: Thomson Reuters Auditorium, 28 Flr, One Raffles Quay, North Tower

Synopsis
“We start with a definition of integrated wealth management and move on to review the major changes experienced by the industry in the last 15 years. Having noted that they are both gratifying and important, we then proceed to investigate areas where deeper work and analysis is required with a view to improving both the nature and the extent of the service provided by our industry to high net worth individuals.”

Speaker Bio
Mr. Brunel is the managing principal of Brunel Associates, a firm offering wealth management consulting services to ultra-affluent individuals. He spent the bulk of his career in the investment management group of J.P. Morgan, where he worked in the United States and abroad from 1976 until his retirement in the spring of 1999. In 1990, he assumed the position of chief investment officer of J.P. Morgan’s global private bank, where he focused on the issues of special concern to individual investors, such as tax efficiency and downside risk protection. Prior to that, he served in New York, Tokyo, Hong Kong, Singapore, and Melbourne in various investment and managerial capacities. Upon retiring from J.P. Morgan, he started consulting for wealthy individuals and the institutions that serve them. He served as chief investment officer of private asset management at U.S. Bancorp, a position he held until June 2001 when he left to found Brunel Associates.

Mr. Brunel is the editor of the Journal of Wealth Management, has participated in various taskforces for CFA Institute, and is a trustee of the Research Foundation of CFA Institute. He also authored Integrated Wealth Management: The New Direction for Portfolio Managers, a book published in 2002 by Institutional Investors and Euromoney Books. A graduate of Ecole des Hautes Etudes Commerciales in France, Mr. Brunel holds an MBA from the Kellogg Graduate School of Management at Northwestern University.

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