



Rotary Club of San Francisco West



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The Rotary Club of San Francisco West meets Wednesdays at 6:00 pm at Villa Romana, 731 Irving Street near 9th Avenue, San Francisco.

Date	Speaker, Organization, Topic
June 6, 2007	 <p>James C. Brandon, President, JBC Capital Performance, a financial management firm that provides provides financial planning, risk management, and asset management services. Mr. Brandon founded JCB Capital Performance in 2000 after almost 20 years in the investment industry. He received his B.A. from Berkeley in 1982. Topic: Modern Portfolio Theory (MPT) is now used by most institutional investors, but not by most individual investors, to manage their portfolios. With MPT, individual investors could improve their investment results. The talk explains what Modern Portfolio Theory is, using examples of well-known funds, such as the \$250 billion CALPERS portfolio, managed with MPT. MPT can be applied to portfolios of any size — even a new IRA account with just the initial year's funding. See a PowerPoint-style outline of the talk (pdf, 516K).</p>
June 13, 2007	T.B.A.