

# IMI INVESTMENT MANAGEMENT INSTITUTE



Russ Mason, founded IMI and over the past 27 years he has built one of the most highly regarded financial advisory companies in America. The Investment Management Institute hosts over 30 major investor events a year and its Weekly Wire Service is a must read for the top professionals in the wealth management business. It should be read by every investor in America.

Common sense and a keen nose for the market combined with a total commitment to client service, has distinguished the company. It's all about "providing the best possible information in an environment that allows for detail inquiry", Mason says. "We provide top advisors in pristine resort locations, allowing for frank and detailed discussion of positions and opportunities" in institutional investment. "We want advisors and clients to leave our forums, either sure that they are right or questioning and reviewing their positions," he adds. Russ Mason is a charming and very focused man, who believes that it is essential to constantly review and learn from the best professionals in the investment arena.

Russ packaged the skills honed as Director of Education and Programs with the Financial Analysts Federation, better known these days as the CFA Institute, where he developed ongoing educational programs for senior level executives at top banks, insurance companies and advisory firms; lectured extensively and published articles on portfolio management, estate planning, personal money management, security analysis, wealth management, and investment strategy.

Through IMI he packaged the best of this earlier experience and made the information accessible to a broader audience, and IMI has built that audience one person at a time. "We protect and empower the individual investor", Mason says. "It's great to present alpha-generating alternatives (for investors); for example: private equity opportunities, hedge funds, international or emerging assets". We provide the top talent in the country and allow them to present their products and then encourage a frank and detailed discussion of the issues". "We don't provide solutions; we present opportunities and the skill set to critically assess them". "You may not leave with the answer, but you will leave with the right questions." As we mentioned earlier, Russ Mason is a focused man.

If you wish to acquire the skills to manage your financial estate or if you are responsible for the responsible management of assets for a foundation or a private fund, please join Investment Management Institute for its next prestigious Forums.

Issues to be discussed:

- \*Optimizing asset allocation,
- \*Engaging in value-based philanthropy,
- \*Renewable and sustainable energy options
- \*Building the family office's relationship with its consultant.

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IMI's Weekly News Wire Service

Subscribe today at:

[www.investmentmanagementinstitute.com](http://www.investmentmanagementinstitute.com)

A must read in today's volatile and disturbing economic climate.

A weekly digest of important issues and the opportunities that they present. Tailored to the exacting demands of Financial professionals, but written without excessive technical language and with the desire to be helpful for everybody who needs to keep an eye on their money.

Topics are targeted to provide an overview of the important issues of the week:

- \*Interest rates, higher or lower?
- \* Could the dollar be about to reverse course?
- \*Is NYC becoming the service center for the global Wealthy?
- \*Following Europe's lead, socially responsible investing becomes more mainstream in the US.
- \*Restoring trust is challenge for banks in 2008.
- \*Are wealthy families losing faith in their financial institutions?

Also included is a cherry picked list of managed fund offerings, organized into useful sections and selected by the professional staff at IMI, a great place to look for new opportunities and to compare offerings.

Another valuable service is the monthly consultants' conference calls, primarily directed at top-tier money managers, but also a great way to get to see how the big boys see the game being played.

After a little while you will want to take all this valuable information and attend one of IMI prestigious Forums, where top financial experts freely explain their strategy and positioning and where you will have the opportunity to ask questions and meet other financially responsible people like yourself.

The Forums are held in spectacular resort locations: such as the Equinox Resort and Spa, Vermont; Longboat Key Florida; Chateau Frontenac, Quebec.

Forums are scheduled regularly and focus on different financial opportunities. Call the IMI Forum desk for detailed information, and one of the Forum Directors will help you choose the venue that is best for your suited to your specific needs.

IMI welcomes comments and is constantly revising its products to better serve its clients.

Please feel free to contact us at 203 622 5851 or visit with us at one of our introductory cocktail receptions.

Russ and his wife Ann divide their time between their contemporary home located in the woods of Greenwich, CT where Russ has spent most of his adult life, and their vacation home in the stunning red rocks country of Sedona, AZ. They are involved in alternative medicine, collect southwestern art, and enjoy taking extended daily walks in back country Greenwich. They have one son, Craig, and two young grandsons, Cooper and Corbin. Russ is a graduate of the University of New Hampshire and is a member of The Boston Society of Security Analysts and the CFA Institute.