



R.N. CROFT FINANCIAL GROUP INC.



CROFT CAPITAL MANAGEMENT

Burgeonvest Toronto and the Montreal Exchange are pleased to present

# An Evening with Richard Croft

Author - Portfolio Manager – Respected Industry Commentator

Tuesday, November 27<sup>th</sup>, 6:30pm – 8:30pm



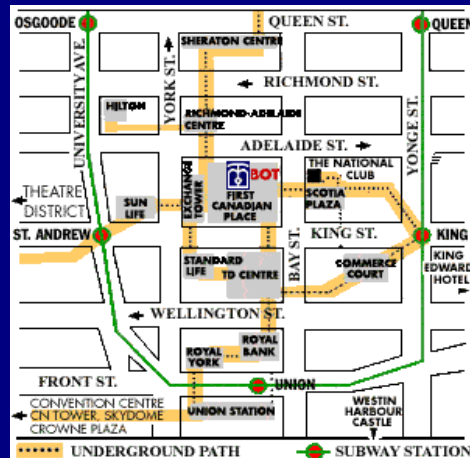
Please be our guest for dinner at the Toronto Board of Trade as Mr. Croft discusses the use of Exchange Traded Funds in building your portfolio and the use of Risk Management to protect it.

Fundamental Convictions: • Markets are Unpredictable • Investor Attitudes and Circumstances Change

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## Richard Croft

Richard N Croft has been in the securities business since 1975. Since February 1993, Mr. Croft has been licensed as an investment counselor/portfolio manager, operating under the corporate name R. N. Croft Financial Group Inc. The company provides personal portfolio management and consulting services to individual investors.

Mr. Croft authors a regular Portfolio Matters column on the National Post that appears each Tuesday. He is also a regular contributor to the MoneyLetter, where his articles focus on utilizing individual stocks, mutual funds and exchange traded funds within a portfolio model.

In 1998, Mr. Croft co-developed three FPX Indices for the National Post which examine the returns for a series of portfolios geared to average Canadian investors. In 2004, Mr. Croft extended that concept to include three RealWorld portfolio indices which purport to demonstrate the performance of the FPX portfolio indices adjusted for real world costs. In both cases, these indices provide portfolio benchmarks for individual investors. Past performance of the indices is available on his website calculator.

In 1999, Mr. Croft developed two option writing indices for the Montreal Exchange, and he regularly authors options commentary at the MX Website. He developed the FundLine methodology, which is a graphic interpretation of portfolio diversification. Specifically the FundLine defines what elements of diversification a specific mutual fund brings to the portfolio.

He also developed an index for rating the performance of fund managers. The proprietary model known as Manager Value Added Index (MVA Index), rates mutual fund portfolio managers on a risk adjusted basis relative to a benchmark.

In 1999, Mr. Croft co-developed a portfolio management system for Charles Schwab Canada. This portfolio program was designed to provide registered advisors at Charles Schwab Canada with a defensible long term investment program that could be marketed to Charles Schwab clients worldwide.

Mr. Croft is a global portfolio manager who focuses on risk adjusted performance. He believes it is not just about return, it is about how that return was achieved.

Most recently, Mr. Croft co-authored a Canadian best seller on portfolio building entitled Protect Your Nest Egg. This was Mr. Croft's ninth book.