Exhibit R-156

CFA Candidate Readings

1996-1998
1996 CFA Level I Candidate Readings
Portfolio Management

This book contains the readings assigned in Study Session 21–Study Session 23 of the 1996 Level I curriculum.

- *Cases in Portfolio Management*, John W. Peavy III and Katrina F. Sherrerd (AIMR, 1990)
  - "Portfolio Management: The Portfolio Construction Process"
  - "The Allen Family" and Guideline Answers
  - "Mid-South Trucking Company" and Guideline Answers
ASSET VALUATION II

Study Session 16-2


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Study Session 21-1B


Study Session 21-1C


Study Session 21-2

Study Session


1998 LEVEL III READINGS
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10-1B  "Real Estate Investment Trusts," The Handbook of Real Estate Portfolio Management, David H. Downs and David J. Hartzell (Irwin Professional Publishing, 1995)  64


10-3  "Investing in Foreign Real Estate," Real Estate Investing in the 1990s, Andrew E. Baum (AIMR, 1995)  126


PORTFOLIO MANAGEMENT (continued)


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ISBN 1-879087-88-X

Printed in the United States of America