



JON LUSKIN, MBA, CFP® Financial Planner, Author, Speaker

As seen in:

Journal of
Financial Planning

InvestmentNews

Seeking Alpha^α

PRESENTATIONS

Presentations can be approved for CEs for the CFP® designation.

TOTAL PORTFOLIO PERFORMANCE: TREASURIES VERSUS CORPORATE BONDS IN A PORTFOLIO ALONGSIDE EQUITIES

Corporate bonds offer a risk and tax premium over U.S. government bonds – but do these premiums sufficiently compensate investors for the added risk and higher tax bill of holding corporate debt?

ENDOWMENT INVESTING CASE STUDIES

Legendary endowment manager David Swensen posits smaller institutions should exclusively use low-cost investments. Most endowments ignore this suggestion. Are they right to? Can alternative assets outperform low-cost investments?

Jon Luskin is a fee-only CERTIFIED FINANCIAL PLANNER™ (CFP®) professional, author and speaker. He has been recognized as one of the financial planning industry's top young advisors by InvestmentNews magazine.

“ The presentation was very well received and we were *extremely impressed*. Your members are sure to come away with new and insightful information. I would *highly recommend* Jon as a speaker for any FPA Chapter. ”

Mark A. Halby, CFP® AIF®
Programs Chair | Financial Planning
Association of San Diego

SPEAKING ENGAGEMENTS

National Association of Personal Financial Advisors, NAPFA Genesis, February 14, 2018

Financial Planning Association of Minnesota, October 16, 2017

Financial Planning Association, Los Angeles, CA, July 22, 2017

San Diego Bogleheads, May 15, 2017, March 15, 2017, March 13, 2017, September 16, 2016

Financial Planning Association, NexGen, San Diego, October 23, 2013, October 18, 2013

BOOK JON TO SPEAK AT YOUR EVENT!

In addition to writing projects and providing quality financial planning advice to his clients, Jon Luskin regularly presents on investment management topics to financial professionals and lay investors. To inquire about having Jon Luskin speak at your event, visit JonLuskin.com.