



FOR IMMEDIATE RELEASE

Contact: Brady Endl, Business Development Associate  
Tel: 414-270-2274  
Email: [bendl@clearygull.com](mailto:bendl@clearygull.com)

**STEPHANIE CHEDID, AIF® TO PRESENT AT THE 2013 LEADINGAGE NEW YORK FINANCIAL MANAGERS ANNUAL CONFERENCE**

Stephanie Chedid, AIF®, President of Cleary Gull Advisors Inc., is scheduled to present at the 2013 LeadingAge New York Financial Managers Annual conference on September 11, 2013 at The Ostesaga Resort Hotel in Cooperstown, NY. The session is scheduled to run from 3:45-4:45 p.m. EST. Her presentation, titled *Business Assets: An Often Overlooked Aspect of Your Capital Planning Efforts*, will answer the question, “How should a senior living organization include its broader assets in its investment strategy and portfolio asset allocation?”

Senior living executives in attendance will learn how to include assets such as real estate and secondary business ventures – home healthcare, pharmaceutical or physical therapies - as “alternative investments” when determining an asset allocation and investment strategy. The presentation is designed to help executives:

- Make better capital planning decisions
- Take more appropriate portfolio risks
- Understand how their organization’s investment portfolio will respond

Ms. Chedid will incorporate relevant findings from the yet to be officially released *Cleary Gull Advisors Inc. 2013 Senior Living Asset Allocation Study*. This annual proprietary study provides a useful tool to gain valuable insights into what industry peers are doing within their investment programs, their outlook for the future and near term positioning they expect to take.

**About Cleary Gull**

Cleary Gull is a privately-held and employee-owned firm headquartered in Milwaukee, Wisconsin providing individual and institutional investment advisory and investment banking services to individuals, corporations and organizations throughout the nation. Cleary Gull’s assets under advisement as of March 31, 2013 were over \$2.6 billion. [www.clearygull.com](http://www.clearygull.com)

###