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THE INTELLIGENT PORTFOLIO
PRACTICAL WISDOM
ON PERSONAL INVESTING
FROM FINANCIAL ENGINES

by

CHRISTOPHER L. JONES
FOREWORD by Nobel Laureate William F. Sharpe

Christopher L. Jones' **THE INTELLIGENT PORTFOLIO: Practical Wisdom on Personal Investing from Financial Engines** (Wiley; May 2008; \$27.95; Hardcover) reveals the inner workings of investment markets, including the all-important relationship between risk and return. Jones shows how investors can improve their chances of reaching financial goals by employing modern financial techniques that link current decisions with future investment outcomes. Readers will understand why Peter Bernstein, author of *Capital Ideas Evolving*, says **THE INTELLIGENT PORTFOLIO** "is worth many multiples of anything else in this overcrowded field."

The Intelligent Portfolio goes beyond simple rules of thumb and historical statistics to illustrate the critical tradeoffs that underlie all investment decisions. Using sophisticated simulation techniques, Jones shows you how to evaluate the tradeoffs between risk and return for a variety of popular investments, a timely and important lesson given recent volatility in financial markets. Outcomes-based investing enables a more informed approach to reaching your financial goals by illustrating the full range of investment outcomes for your portfolio *before* you decide to invest. The future may be unpredictable, but it is possible to structure your investment strategies that take into account the full range of possibilities. Using the ideas clearly explained in this book,

you will be able to create investment strategies that improve your chances for a successful and secure financial future.

Jones is the Chief Investment Officer and Executive Vice President of Investment Management at Financial Engines, a company founded by Nobel Prize winning economist William F. Sharpe. To help readers along their path to secure financial future, Financial Engines has agreed to waive the fees for a 12-month subscription to its award-winning *Personal Online Advisor* service -- a \$300 value -- for purchasers of **THE INTELLIGENT PORTFOLIO** so that they can better apply the ideas presented here to their own personal circumstances.

THE INTELLIGENT PORTFOLIO sets forth ten basic concepts every investor needs to know in order to make good investment decisions, including how to:

- Recognize the link between risk and reward, and what it means for your future goals
- Select an appropriate risk level for your investments.
- Diversify intelligently to ensure your portfolio is protected against undue risk.
- Properly assess the impact of investment fees.
- Realistically fund financial goals so that you can meet your financial objectives.
- Select funds using relevant, forward-looking criteria instead of just past performance .
- Avoid being led astray by promises that are literally too good to be true.

THE INTELLIGENT PORTFOLIO distills the most important lessons from modern financial economics down to a few key ideas and combines it with practical advice on how to make better investment decisions. If you learn and follow these principles, you will become a better investor as well as a better judge of whether or not you are getting good investment advice.

Jones has an ability to clearly explain the most complex investment ideas and bring them down to earth. His style is engaging. His thought is richly practical but firmly based in solid financial theory and rigorous empirical testing. He draws heavily on insights gained by working with hundreds of thousands of individual investors struggling with important, lifetime financial decisions. **THE INTELLIGENT PORTFOLIO** provides a unique blend of insightful analysis and practical wisdom on making better investment decisions during these turbulent financial times.

About the Author

Christopher L. Jones is Chief Investment Officer and Executive Vice President of Investment Management for Financial Engines. Working closely with Nobel Prize winner William F. Sharpe, Jones built and led a team of experts in finance, economics, and mathematics that developed the financial methodology for Financial Engines' personalized investment advice and

portfolio management services. Jones has frequently appeared in articles for *The New York Times*, *The Wall Street Journal*, *Business Week*, *Newsweek*, *Fortune*, *The Los Angeles Time*, *The San Francisco Chronicle* and other national publications. He also regularly speaks at industry conferences and events. He holds an MS in business technology, an MS in engineering-economic systems, and a BA in quantitative economics all from Stanford University.