



**OAKbridge** LIMITED

Financial Consulting Group

certainty & profit

## ATTAINING LEADERSHIP ASSURANCE AND PRICE CERTAINTY IN AN UNCERTAIN WORLD: THE OAKBRIDGE APPROACH

### 1. WHAT DOES OAKBRIDGE DO?

We live in a world where prices (eg interest and exchange rates, and commodity and equities prices) are often unregulated and volatile. Like it or not, this volatility produces **risk** for any individual or any corporation subject to such prices. If prices always moved in one's favour, financial risk management would be a non-issue. Prices do **not** so move and, consequently, a decision must be taken about **doing something** about the risks engendered by volatile prices. Doing nothing is typically no longer an acceptable alternative – unless one is content to trust one's future solvency to the direction of the winds gusting through domestic and international financial markets.

**Oakbridge shows clients how to “do something” about price risks so as to attain price certainty in an uncertain world!** This is accomplished through various workshops and/or specific consulting advice that focus on:

- sound financial corporate governance practices which underlie financial risk management policy formulation and implementation

and

- various financial markets workshops which demonstrate the appropriate use of a range of financial transactions which can be used to engineer “appropriate” solutions to financial risk management problems which are often viewed as being otherwise intractable.

### 2. WHO BENEFITS FROM THE OAKBRIDGE APPROACH?

**Bankers and financial institutions personnel**, including:

- financial markets risk managers
- corporate financial markets advisory staff in dealing rooms
- account officers (who must be competent to speak to corporate clients in an authoritative manner on financial transactions)
- relatively inexperienced university graduates in the process of acquiring a practical grounding in the workings of financial markets.

**Corporate treasury personnel**, who must be able to:

- identify and use appropriate financial transactions
- manage financial risks related to volatile interest and exchange rates, and commodity and equities prices
- understand the interactions, in a financial risk management context, between the "physical" (or cash) market and the various linked markets for derivative products.

**Lawyers**, who must understand:

- financial markets terminology and jargon

- the structuring and pricing of market transactions so as to be able to frame legal agreements which fully encompass the needs of clients having financial markets activity.

**Accountants and auditors**, who must:

- understand the structuring and pricing of market transactions so as to be able to make informed judgments as to clients' financial markets activity, particularly with respect to auditing financial markets transactions.

**Government regulators**, particularly central bankers and government Treasury or Finance personnel:

- who must thoroughly understand market transactions and practices in order to be able to frame appropriate legislation and regulations.

### 3. HOW DOES OAKBRIDGE ACHIEVE ITS SUCCESSES?

Proven, technically sound, workshop principles that emphasise **practicality and profit** are applied to:

- realistic case studies (in the case of the various Oakbridge financial markets workshops)

or

- **actual** client corporate financial governance or financial risk management problems

to produce **solutions tailored to a specific desired risk/reward combination**. These solutions, perhaps counter-intuitively, do not **necessarily** entail a trade-off between risk and reward.

Depending upon specific - but easily-defined and frequently occurring - financial markets conditions, Oakbridge workshop attendees and/or consulting clients can be shown solutions to financial risk management problems which entail **guaranteed gains for no risk!**

### 4. WHAT CONSTITUTES THE “OAKBRIDGE COMPETITIVE EDGE”?

Two highly significant factors, which are:

- (i) an innovative and easily comprehensible consulting and workshop methodology that:
  - uses colour-coded arrows to demystify financial transactions and
  - produces surprisingly simple solutions to otherwise complex financial risk management problems

and

- (ii) the technical financial expertise and exceptional explanatory clarity of the presentations of **John R. Rush**, an **internationally experienced and respected financial markets practitioner**.

Comprehensive information on Oakbridge's financial markets workshops, its approach to consulting assignments, John R. Rush's professional background and numerous testimonials are all available on Oakbridge's Internet site at:

**[www.oakbridgelimited.com](http://www.oakbridgelimited.com)**