

Saturday, January 14, 2017



A REVIEW OF ASSET CLASS PERFORMANCE: ELECTION, FED AND OIL

Bill Jump

Serves on the Board of AAI Silicon Valley Chapter

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2017 U.S. AND GLOBAL OUTLOOK: MARKETS AND THE ECONOMY

Michael Yoshikami

CEO and Founder, Destination Wealth Management

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Chapter Information

Chapter President Lynn Gillette

Email aaichapter_siliconvalley@yahoo.com

Web Page www.aaii.com/localchapters

Website www.siliconvalleyaaii.org

Facebook www.facebook.com/sv.aaii

Meetup www.meetup.com/AAll-Silicon-Valley-Meetup

Special Interest Groups

INVESTING DISCUSSION GROUP

Lynn Gillette and Valerie Fitch

aaichapter_siliconvalley@yahoo.com

The Investing Discussion Group meetings are a way to discuss investment ideas in a relaxed, small group setting. Meetings are on the fourth Monday of each month (except December) at 6:30 p.m. in the Holder's Country Inn, 998 S. DeAnza Blvd., San Jose. Phone: 408-244-2798, map: <http://tinyurl.com/z4599o8>

FINANCIAL PLANNING WORKSHOPS

fred@fredsmithfinance.com

Our series of Financial Planning Workshops will be repeated beginning on the second Wednesday each month at 7:00 p.m. at the

Special Interest Groups Los Altos Library, 13 S. San Antonio Road. The topic for the **December 14** workshop is Active versus Passive Investment Strategies. Admission is free.

COMPUTERIZED-MECHANICAL INVESTING GROUP

Al Zmyslowski

al_zmyslowski@yahoo.com

The CIMI group discusses how to use computers in investing focusing on rules, algorithms, programs and computerized investing tools of various flavors. Meetings are on the first Thursday of each month at 6:30 p.m. at Holder's Country Inn, 998 S. DeAnza Blvd., San Jose, CA. Phone: 408-244-2798, map: <http://tinyurl.com/z4599o8> See <http://tinyurl.com/pug8ybv> for further detail on CIMI.

Future Meeting

Saturday, February 11, 2017

Topic: **MOMENTUM INVESTING**

Speaker: **Gary Antonacci and Peter Lingane**

Chapter Message

Future schedule for the free financial planning workshops at the Los Altos Library: 2/8 Managing Your Cash Flow in Retirement; 3/8, Safe Withdrawal Rates From Your Retirement Portfolio; 4/12, Social Security and Medicare; 5/10, Estate Planning. Our plan is to webcast these sessions. Registration for the webcast will be via www.SiliconValleyAAII.Eventbrite.com.

—Lynn Gillette, Chapter President

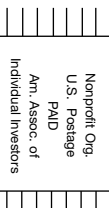
AAII Local Chapters

SILICON VALLEY MEETING

REGISTER EARLY & SAVE! See inside for details



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SUITE 1900
CHICAGO, IL 60611-3151
800-428-2244



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Individual Investors

REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, January 14, 2017

Name: _____

Email: _____

Phone: (_____) _____

Family/Guest Name(s): _____

_____ # Everyone: \$ _____

Total Fees: \$ _____

Please indicate any ADA disability
needs: _____

YES! I would like more information about
volunteering to help this chapter.

Mail completed form with your
check (payable to AAI) to:

AAII Silicon Valley Chapter
P.O. Box 58
Cupertino, CA 95015

No confirmation will be sent; your
canceled check is your receipt.

Meeting Details

Saturday, January 14, 2017

AMC CUPERTINO SQUARE THEATER #14

10123 N. Wolfe Rd.
Suite 3000 (3rd floor)
Cupertino, CA 95014
408-252-5960

SCHEDULE

Registration/Social, 8:30 a.m.
Chapter Announcements, 8:55 a.m.
First Presentation, 9:00 a.m.
Second Presentation, 10:30 a.m.
Q&A, 11:30 a.m.

FEES

In Advance
(Postmarked by 1/9; online by 1/11)
Everyone, **\$23**/person

Late Registration (online by 1/13)
Everyone, **\$30**/person

At the Door
(space permitting)
Everyone, **\$30**/person
Persons under 25 (with ID), **Free**
No pre-registration is required.

REFUND POLICY

No refunds.

More Information

Directions: tinyurl.com/njkqk5x
Look for and park near
the AMC Theaters.

Forever ticket holders: Free entry but
your name will be requested

No refreshments provided.
Refreshments available for purchase
at the AMC counter.

Visit our book swap table
before the meeting begins.
Bring a book — take a book!



Bill Jump retired from IBM as an executive project manager after a 48 year career. He is a graduate of UC Berkeley in electrical engineering and has a Master's certificate in project management from George Washington University. Jump is a lifetime member of AAI and serves on the board of the AAI Silicon Valley Chapter.



Michael Yoshikami, Ph.D., CFP, is CEO and founder of Destination Wealth Management, a San Francisco Bay wealth-management firm. As chairman of DWM's Portfolio Strategy Committee, Yoshikami oversees the macro tactical asset allocation weightings for client portfolios and develops the economic viewpoints that guide portfolio strategy. He is author of "Your Money, Your Future."

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YOU WILL LEARN

- About asset class performance since the Brexit vote to early January time frame
- The impact of the Fed's December decision on rates
- The impact of the November OPEC meeting

A review of asset class performance leading up to the presidential election and following the election will be presented. A number of key factors are in play, including the election, Fed action on rates and OPEC influence on oil.

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Michael Yoshikami

CEO and Founder, Destination Wealth Management

YOU WILL LEARN

- What drives market volatility
- About interest rate policy and its impact on investment strategy
- How to develop a portfolio plan for 2017

The economy and market continue to be quite uncertain and investors are grappling with how to develop the right investment strategy for their unique needs. This presentation is designed to provide context on how to construct an appropriate portfolio plan based on a person's financial goals and objectives.