

Saturday, February 11, 2017



**DUAL MOMENTUM
INVESTING FOR MORE
PROFIT WITH LESS RISK**

Gary Antonacci

Author, "Dual Momentum Investing"



**MOMENTUM STRATEGIES
TO INCREASE RETURN AND
REDUCE RISK**

Peter Lingane

Principal, Financial Security by Design

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Chapter Information

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Email aaichapter_siliconvalley@yahoo.com
Web Page www.aail.com/localchapters
Website www.siliconvalleyaail.org
Facebook www.facebook.com/sv.aail
Meetup www.meetup.com/AAIL-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 Community Room at Los Altos Library, 13 S. San Antonio Road. The topic for the **February 8** workshop is Managing Your Cash Flow in Retirement. 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.

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.SiliconValleyAAIL.Eventbrite.com.

—Lynn Gillette, Chapter President

AAIL 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

Nonprofit Org.
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Individual Investors

REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, February 11, 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, February 11, 2017

AMC CUPERTINO SQUARE THEATER

10123 N. Wolfe Rd.
Suite 3000
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.

FEES

In Advance

(Postmarked by 2/6; online by 2/8)
Everyone, **\$23**/person

Late Registration (online by 2/10)
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:

[www.google.com/maps/place/
AMC+Cupertino+Square+16](http://www.google.com/maps/place/AMC+Cupertino+Square+16)

Photo directions to AMC are at:
tinyurl.com/oqnsqv7

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!



Gary Antonacci is author of the award-winning book "Dual Momentum Investing: An Innovative Strategy for Higher Returns With Lower Risk" (McGraw-Hill, 2014). In 2012, Antonacci was winner of the prestigious Wagner Award for Advances in Active Investment Management. He received his MBA from Harvard Business School.



Peter Lingane is an independent California-registered investment adviser who provides fee-only financial advice and brings his considerable analytical skills to both tax and investment issues. He is a self-described "recovering buy and hold investor." He can be reached at www.lingane.com.

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Gary Antonacci

Author, "Dual Momentum Investing"

YOU WILL LEARN

- To spot the best momentum investment opportunities in any market environment
- To protect yourself from bear market risk
- How to construct your own low-cost, rules-based dual momentum portfolio

Gary Antonacci will explain the origins and history of momentum investing. He will also show how relative strength momentum can enhance investment returns, while trend-following absolute momentum can dramatically decrease risk exposure.

MOMENTUM STRATEGIES TO INCREASE RETURN AND REDUCE RISK

Peter Lingane

Principal, Financial Security by Design

YOU WILL LEARN

- How the dual momentum strategy compares to the NoLoad FundX newsletter
- How a Level3 portfolio can provide more return and less risk than a more conventional portfolio
- Why it is prudent to base investment decisions on the recommendations of several algorithms

Peter Lingane will compare the performance of dual momentum to that of the NoLoad FundX and SectorSurfer momentum strategies. He will also show that high-return Level3 portfolios can be less risky than conventional retirement portfolios.