

Chapter Information

RESOURCES

Email Lynn Gillette, 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 Notes

Forever ticket holders: preregister to get a guaranteed seat. Send in your ticket by **10/2** for our October Meeting and **11/6** for our November Meeting to the address on registration form. At the door, admission is space permitting.

Visit our **book swap table** before the meeting begins. Bring a book, take a book.

Special Interest Groups

All SIG groups meet at Holder's Country Inn, 998 S. DeAnza Blvd., San Jose. Phone: 408-244-2798, map: <http://tinyurl.com/z4599o8>

INVESTING DISCUSSION GROUP

Lynn Gillette and Valerie Fitch
aaichapter_siliconvalley@yahoo.com

Meets the second Wednesday of each month, from September through June at 6:30 p.m.

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.

FINANCIAL PLANNING DISCUSSION GROUP

Fred Smith
fred@fredsmithfinance.com

These meetings feature informal discussions on a broad range of financial planning topics including investing, taxes, retirement planning, and more.

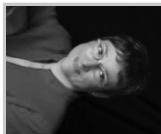
COMPUTERIZED-MECHANICAL INVESTING GROUP

Al Zmyslowski
al_zmyslowski@yahoo.com

The CIMI group discusses and presents ideas on 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. See <http://tinyurl.com/pug8ybv> for further detail on CIMI.

The opinions of speakers are their own and not necessarily those of AAII. It is not the policy of AAII or its local chapters, officers or directors to promote any specific investments or techniques of analysis. Presentations are provided solely for informational purposes and should not be construed as solicitations. There are no representations

or warranties of any kind, expressed or implied, about the completeness, accuracy, reliability, or suitability of meeting information. Investment information presented may not be appropriate for all investors and should be independently verified.



**TAX REFORM IN 2017?
PLANNING AHEAD**
Claudia Hill
Principal, TaxMam, Inc.

Saturday, November 11, 2017

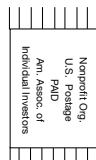


**ADAPTIVE ASSET
ALLOCATION: DYNAMIC
GLOBAL PORTFOLIOS TO
PROFIT IN GOOD TIMES
AND BAD**
Adam Butler
Co-Founder and Chief Investment
Officer, ReSolve Asset Management

Saturday, October 7, 2017



625 N MICHIGAN AVE
SUITE 1900
CHICAGO, IL 60611-3151
(800) 428-2244



REGISTER EARLY & SAVE! See inside for details

AAII Local
Chapters

SILICON VALLEY
MEETINGS

AAII 2017 INVESTOR CONFERENCE

Loews Royal Pacific Resort, Orlando, Florida
Friday, November 3 – Sunday, November 5, 2017

Come a few days before or stay a few days after for the same great discount sleeping room rate (limited availability)

TO REGISTER:

Visit www.aaii.com/Conference
Or call Member Services at **800-428-2244**

Join Us in Orlando

for Sun and Fun and Lots of Investment Education!

If you have ever wanted to know how to diversify your portfolio, choose the stocks best suited for you or create a retirement plan, this program gives you all of that and more. **Act today, event regularly sells out!**

KEYNOTE SPEAKER



Bruce Johnstone
Senior Marketing
Investment Strategist,
Fidelity Investments



Christine Benz
Director of Personal
Finance at Morningstar,
Inc.



Mark Hulbert
Founder of the Hulbert
Financial Digest

KEYNOTE SPEAKER



Meir Statman
Glenn Klimek Professor
of Finance, Santa Clara
University



John Buckingham
Chief Investment Officer,
AFAM Capital



Wayne A. Thorp, CFA
Senior Financial Analyst,
AAII

2017 TOPICS WILL INCLUDE:

- Managing Your Money During Retirement
- Combining the Best Stock Selection Factors
- Investing in an Age of Volatility
- Investing While in Retirement
- AAII Shadow Stock Portfolio
- Building a Diversified "Core" for Every Portfolio
- The Value of Dividends



The beautiful Loews Royal Pacific Resort in Orlando, Florida is located within Universal Orlando directly adjacent to CityWalk with restaurants, shopping and entertainment—all within walking distance. The resort has all the comforts you will need once the sessions are over—beautiful pool with a waterfall, white sand beach and waterslide, as well as a fitness center with sauna and jacuzzi.

REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

REGISTER BY MAIL

AAIL Silicon Valley Chapter

Saturday, October 7, 2017

Name: _____

Email: _____

Phone: (____) _____

Family/Guest Name(s): _____

_____ # Members & Family: \$ _____

_____ # Nonmembers: \$ _____

Total Fees: \$ _____

Please indicate any ADA disability needs:

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

AAIL Silicon Valley Chapter

Saturday, November 11, 2017

Name: _____

Email: _____

Phone: (____) _____

Family/Guest Name(s): _____

_____ # Members & Family: \$ _____

_____ # Nonmembers: \$ _____

Total Fees: \$ _____

Please indicate any ADA disability needs:

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

Fees

OCTOBER 7

In Advance
(postmarked by 10/2;
online by 10/4)
Everyone, **\$20/person**

At the Door
(space permitting)
Everyone, **\$25/person**
Persons under 25
(with ID), **Free**
No Refunds

NOVEMBER 11

In Advance
(postmarked by 11/6;
online by 11/8)
Everyone, **\$20/person**

At the Door
(space permitting)
Everyone, **\$25/person**
Persons under 25
(with ID), **Free**
No Refunds

More Information

Our event location is near CA 237 between US 101 and Interstate 880.

Directions: <http://tinyurl.com/y9anxev8>

NO REFRESHMENTS
Refreshments are not available at this facility.

FOR MAIL-IN REGISTRATION

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

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

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

The AAIL Silicon Valley Chapter Presents 2 New Events...

Saturday, October 7, 2017



ADAPTIVE ASSET ALLOCATION: DYNAMIC GLOBAL PORTFOLIOS TO PROFIT IN GOOD TIMES AND BAD

Adam Butler

Co-Founder and Chief Investment Officer,
ReSolve Asset Management

YOU WILL LEARN

- Why the greatest opportunity for outperformance lies in asset allocation—NOT security selection
- How to create the maximally diversified global “Risk Parity” portfolio
- The steps you can follow now to amplify returns and lower risk in good markets and bad with ETFs

Adam Butler will discuss two topics in this double-header event focused on bleeding edge advances in asset allocation. In the first session, he will discuss how to create the most optimal global portfolio without having to guess at returns. In the second session, he will show you how to integrate robust multi-asset factor/“smart beta” research with advanced portfolio optimization to create adaptive global portfolios to profit in most market conditions—including market crashes. If you’re interested in moving beyond security selection to learn how smart global asset allocation can produce sustainable growth, this talk is for you.

JUBILEE CENTER

Administration Building
175 Nortech Parkway
San Jose, CA 95134
408-262-0900

SCHEDULE

Registration/Social, 8:30 a.m.
Chapter Announcements, 8:55 a.m.
Presentation, 9:00 a.m.
Break, 10:15 a.m.
Q&A, 11:30 a.m.

Saturday, November 11, 2017



TAX REFORM IN 2017? PLANNING AHEAD

Claudia Hill

Principal, TaxMam, Inc.

YOU WILL LEARN

- 2017 federal tax law changes
- Key ideas for year-round tax planning
- About state of California tax and administrative changes

Claudia Hill is an enrolled agent, nationally recognized tax professional and frequent lecturer on taxation of individuals and representation before IRS. She is editor-in-chief of the WoltersKluwer (formerly CCH) Journal of Tax Practice & Procedure.

Hill is also co-author of CCH Expert Treatise Tax Practice & Procedure, a founding partner of Tax Genius Learning and a frequent presenter for both audio and in-person CPE seminars nationwide.

Hill coordinates a “dream team of tax controversy advisers” for the IRS Watch blog on Forbes.com (blogs.forbes.com/irswatch). She was named a Top Ten Nominee by Tax Analysts as 2011 Person of the Year.

Reform or not, consideration of year-end, year-round tax planning is always on the agenda. For those in high-tax states, the stakes are even higher! Don’t face another tax filing season without this on-point review of law, form and regulatory changes.

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