



**Tuomo Lampinen**  
Founder, Silicon Cloud  
Technologies LLC

**JOIN US AND LEARN**

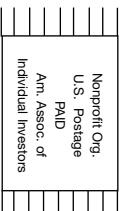
- How to compare asset allocations and analyze historical portfolio performance
- How backtesting and modeling can contribute to your investment success

# PORTFOLIO VISUALIZER: FINANCIAL ANALYSIS TOOLS FOR INVESTORS

**NEW LOCATION!** See Inside for Details



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



SILICON VALLEY  
MEETING

Saturday  
January 13, 2018

## Chapter Information

**Email** Lynn Gillette, [aaichapter\\_siliconvalley@yahoo.com](mailto:aaichapter_siliconvalley@yahoo.com)  
**Web Page** [www.aaia.com/localchapters](http://www.aaia.com/localchapters)  
**Website** [www.siliconvalleyaaia.org](http://www.siliconvalleyaaia.org)  
**Facebook** [www.facebook.com/sv.aaia](http://www.facebook.com/sv.aaia)  
**Meetup** [www.meetup.com/AAII-Silicon-Valley-Meetup](http://www.meetup.com/AAII-Silicon-Valley-Meetup)

## 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](mailto:aaichapter_siliconvalley@yahoo.com)

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.svaaii@gmail.com](mailto:fred.svaaii@gmail.com)

Meets the second Wednesday of each

month, at 6:30 p.m. This group has informal discussions of various financial planning topics.

### COMPUTERIZED-MECHANICAL INVESTING GROUP

**Al Zmyslowski**  
[al\\_zmyslowski@yahoo.com](mailto: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.

## Future Meeting

Saturday, February 10, 2018

Topic: **MARKET REVIEW AND KEY TOPICS FOR 2018**  
Speaker: **Bill Jump**  
*AAII Silicon Valley Chapter Board*

# REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

## REGISTER BY MAIL

ADVANCE REGISTRATION FOR  
Saturday, January 13, 2018

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 13, 2018

### NEW! JUBILEE CHRISTIAN CENTER ADMINISTRATION

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

#### SCHEDULE

**Registration/Social**, 8:30 a.m.  
**Chapter Announcements**, 8:50 a.m.  
**Presentation**, 9:00 a.m.  
**Break**, 10:15 a.m.  
**Q&A**, 11:30 a.m.

#### FEES

##### In Advance

(Postmarked by 1/8; online by 1/10)  
Everyone, **\$20**/person

Late Registration (online only by 1/12)  
Everyone, **\$25**/person

##### At the Door

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

#### REFUND POLICY

No Refunds

## More Information

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

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

**Forever ticket holders preregister to get a guaranteed seat.** Send in your ticket by **1/8** to address on registration form. At the door, admission is space permitting.

**NO REFRESHMENTS WILL BE PROVIDED.** Refreshments are not available at this facility.

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

The AAI Silicon Valley Chapter Presents...

Saturday, January 13, 2018

## PORTFOLIO VISUALIZER: FINANCIAL MODELING AND ANALYSIS TOOLS FOR THE INDIVIDUAL INVESTOR

### Tuomo Lampinen

Founder, Silicon Cloud Technologies LLC



**Tuomo Lampinen** is a software entrepreneur and an independent researcher focusing on quantitative investing and financial modeling. He's the founder of Silicon Cloud Technologies LLC and the author of Portfolio Visualizer, an online platform for quantitative investment analysis tools.

Prior to starting Silicon Cloud Technologies, Lampinen was the co-founder and CTO of Consilience Software Inc., a case management software company, which was acquired by Xerox in 2014.

Lampinen received his master's in computer science from Helsinki University of Technology.

#### YOU WILL LEARN

- How to compare asset allocations and analyze historical portfolio performance
- How backtesting and modeling can contribute to your investment success
- The benefits of factor analysis, asset correlation and Monte Carlo simulation in investment strategies

This presentation will provide a brief theoretical background on different areas of financial modeling and focus on how individual investors can use the available online tools for investment and portfolio analysis, in particular Portfolio Visualizer. The use of the Portfolio Visualizer website is free. This presentation will assist you in using this free website.

The opinions of speakers are their own and not necessarily those of AAI. It is not the policy of AAI 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.