

# AAII 2018 INVESTOR CONFERENCE

## OCTOBER 26 – 28, 2018

PLUS PRE-CONFERENCE BOOT CAMP OCTOBER 25  
PARIS LAS VEGAS HOTEL | LAS VEGAS, NEVADA

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

[www.aaii.com/Conference](http://www.aaii.com/Conference)

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.

### A Selection of Our Exciting 2018 Speakers:



The Ultimate Buy and Hold Strategy  
**Paul Merriman**, president of The Merriman Financial Education Foundation



Retirement Planning: What We Know for Sure  
**Christine Benz**, director of personal finance at Morningstar Inc.



Exotic Trusts and When to Use Them  
**John Horn and Dera Johnsen-Tracy**, attorneys with Horn & Johnsen SC



How to Analyze Dividend Stocks  
**Jaclyn McClellan**, associate financial analyst at AAI; editor of AAI Dividend Investing

Experience everything you love about Paris in the heart of the Las Vegas Strip. You will be transported to the City of Lights with all the same passion, excitement and ambiance of Europe's most romantic city, combined with the thrill of the entertainment capital of the world.



REGISTRATION NOW OPEN! DISCOUNTED RATES!

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**Tyler**

Author,  
*PortfolioCharts.com*

- **JOIN US AND LEARN**
- How to use historical data to make good investing decisions while avoiding common pitfalls
- Actionable steps to build a low-maintenance portfolio to support your important life goals

# PRACTICAL ASSET ALLOCATION STRATEGIES FOR EVERYDAY INVESTORS (WEBCAST)

ONLINE ONLY! HOME VIEWING! See Inside for Details

AAII Local Chapters

SILICON VALLEY MEETING

Saturday  
June 9, 2018



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

**REQUIRED!**  
**REGISTER ONLINE**  
www.siliconvalleyaaii.eventbrite.com

### More Information

This is an online presentation only. Advanced registration is required. There is no location to go to. Participants must register online at the Eventbrite link above. The event will be complete at 11:45 a.m.

### Chapter Information

**Web Page** www.aaii.com/localchapters  
**Website** www.siliconvalleyaaii.org  
**Facebook** www.facebook.com/sv.aaii  
**Meetup** www.meetup.com/AIIL-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**  
aaiichapter\_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

Meets the second Wednesday of each month, from September through June, at 6:30 p.m. This group has informal discussions of various financial planning topics.

### Meeting Details

**Saturday, June 9, 2018**

**NO LOCATION**  
**HOME ACCESS TO ONLINE MEETING**

#### SCHEDULE

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

#### FEES

**In Advance**  
(Online by 6/8)  
Everyone, **\$10**/person

#### REFUND POLICY

No refunds unless webcast cannot be held.

#### 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 AAI Silicon Valley Chapter Presents ...

**Saturday, June 9, 2018**

## PRACTICAL ASSET ALLOCATION TOOLS & STRATEGIES FOR EVERYDAY INVESTORS (WEBCAST)

**Tyler**

*Author, PortfolioCharts.com*



**Tyler** is a mechanical engineer with a deep personal interest in investing, a passion for good data and some nifty Excel skills he's picked up over the years.

Tyler also has a creative product design pedigree, a sensitivity for when statistics become unapproachable and a knack for explaining complex ideas in understandable terms.

Mix that all together and you get PortfolioCharts.com, Tyler's personal hobby project created to communicate modern investing concepts via intuitive visuals and real-world examples that look beyond the raw numbers.

### YOU WILL LEARN

- How to use historical data to make good investing decisions while avoiding common pitfalls
- Simple but counterintuitive asset allocation concepts to improve risk-adjusted returns
- Actionable steps to build a low-maintenance portfolio to support your important life goals

The author of PortfolioCharts.com will discuss evidence-based methods to invest like a pro using sophisticated but low-key index investing strategies. Topics will include how to evaluate the claims of portfolio experts pitching competing ideas, how to account for uncertainty in your financial planning, and how to create an asset allocation that effectively manages risk. Whether you're a beginner looking for guidance or an expert interested in unique portfolio modeling tools, there should be useful information for all types of investors.

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

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