

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

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!

www.aaii.com/Conference • 800-428-2244



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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