

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:



Outlook 2019: Awaiting a Post-Election Pop
Sam Stovall, CFP, chief investment strategist, CFRA Research



How Does the Bucket Strategy Work in Practice?
Christine Benz, director of personal finance at Morningstar Inc.

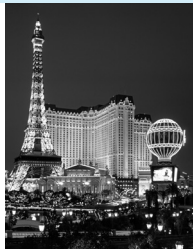


The Biggest Mistakes Many Investors Make & What to Do About Them
Mebane Faber, chief investment officer, Cambria Investment Management



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 FILLING UP FAST!

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

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

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ROBO-ADVISERS: WHAT THEY DO AND HOW TO BEAT THEM
Jaclyn McClellan

Associate Financial Analyst, AAI;
Product Manager, AAI Dividend Investing

FINDING A STOCK WINNER: FIRST STEP SCREENING
Jaclyn McClellan
Associate Financial Analyst, AAI;
Product Manager, AAI Dividend Investing

Saturday, September 8, 2018



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(800) 428-2244

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Individual Investors

REGISTER EARLY & SAVE! See inside for details

AAII Local Chapters

SILICON VALLEY MEETINGS

Chapter Information

RESOURCES

Email Lynn Gillette, aaiichapter_siliconvalley@yahoo.com

Web Page www.aaii.com/localchapters

Website www.siliconvalleyaaii.org

Facebook www.facebook.com/sv.aaii

Meetup www.meetup.com/AAII-Silicon-Valley-Meetup

CIMI: <https://groups.yahoo.com/neo/groups/AAII-SV-CI-MI-Group/info>

Driving Directions

NOTE: THIS IS A NEW LOCATION. Our new home is at the Garden House at Shoup Park in Los Altos. The Garden House represents a significant upgrade to the Jubilee location. The nearest freeway exit is Interstate 280's El Monte Exit in Los Altos. **See AAI Silicon Valley website for more information and detailed driving instructions: www.siliconvalleyaaii.org.**

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.svaai@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.

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.

Future Meeting **Saturday, October 13, 2018**

Topic: **2018 TAXES**

Speaker: **Alan Pinck**

REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, September 8, 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

NEW LOCATION! SHOUP PARK GARDEN HOUSE

400 University Avenue
Los Altos, CA 94022

SCHEDULE

Registration/Social

8:30 a.m.

Chapter Business

8:35 a.m.

First Program

9:00 a.m.

Break

10:15 a.m.

Second Program

10:30 a.m.

Q&A

11:30 a.m.

FEES

In Advance

(postmarked by 9/4;
online by 9/6)

Everyone, **\$20**/person

At the Door

(space permitting)

Everyone, **\$25**/person

Persons under 25

(with ID), **Free**

No Refunds

More Information

Forever ticket holders
must preregister to be
guaranteed a seat.

NO REFRESHMENTS

WILL BE PROVIDED.
Refreshments are not
available at this facility.

On September 8, 2018, the AAI Silicon Valley Chapter Presents ...

ROBO-ADVISERS: WHAT THEY DO AND HOW TO BEAT THEM

Jaclyn McClellan

Associate Financial Analyst, AAI;
Product Manager, AAI Dividend
Investing

YOU WILL LEARN

- What robo-advisers are, along with their benefits and caveats
- How the services handle portfolios in changing market conditions
- How the performance of robo-advisers compares to human advisers

Online advisory services, or robo-advisers, are a new phenomenon in today's investing world. With their growing capacity, services and assets under management, it's important to understand not only what they are but how they work. Many robo-services are attempting to cater to individual investors, but are they better than human advisers? If you are considering a robo-advisory service, there are several important elements to look for before handing your money over. While many of the services are intriguing, Jaclyn McClellan, associate financial analyst at AAI, will also show how you might get better returns on your own than by using a robo-service.



Jaclyn McClellan is the associate financial analyst at AAI and is product manager of *AAII Dividend Investing*. She contributes articles and reviews to *Computerized Investing* and writes for the *AAII Journal*.

McClellan also serves on the advisory committee for the *Stock Superstars Report*. She analyzes the fund data and writes the commentary for the Top Mutual Funds Guide, the ETF Guide and the Quarterly Low-Load Mutual Fund Update.

McClellan is an honors graduate from DePaul University with a bachelor of science in business with a major in finance.



FINDING A STOCK WINNER: FIRST STEP SCREENING

Jaclyn McClellan

Associate Financial Analyst, AAI;
Product Manager, AAI Dividend
Investing

YOU WILL LEARN

- How to develop a screening strategy that fits with your horizon, risk tolerance, analytical skills and time
- Which value and growth strategies have had the best performance in AAI's 15-year-plus study of over 50 strategies
- How to identify good investment prospects using value and growth screening strategies

While successful money managers may differ in their investing philosophy, a disciplined approach to selecting and pruning investments is a common characteristic. Jaclyn McClellan will show how computerized stock screening systems can be used to reduce a large universe of stocks into a manageable group of prospects that match your investment style. She will walk through the process of developing and implementing both a value and a growth screen using AAI's Stock Investor Pro fundamental stock screening and research database program.