

It's time to...

Meet the Board

This is your chance to ask Board members about ANY topic...

Speakers??

Pricing??

Discussion groups??

Meeting day??

Meeting time??

Topics??

Registration??

Eventbrite??

Facebook??

Tickets??

CIMI??

Event emails??

Venue??

AAII HQ??

Meetup??

Webpage??

Handouts??

Concierge table??

Event mailers??

Finances??

Raffles??

Webcasts??

AAII Silicon Valley Chapter Events

Coming Attractions

Date	Title	Presenter
December	<u><i>Happy Holidays!</i></u>	<i>You and your family</i>
January	2019 Economic Outlook	<i>Elizabeth Laderman SF Fed</i>
February	REIT Opportunities Behavioral Finance	<i>Brad Thomas, Forbes</i> <i>Richard Lehman UCB-Ext</i>
March	Morningstar & Investing	<i>Christine Benz Morningstar</i>

Striving to bring you the very best speakers
on a variety of investing topics!!

How Do I Get Access to the Event Recording??



If you registered at Eventbrite you're all set!!

If you supplied your email when you mailed in your form – you're done!!



If you're a walk in – and gave us your email address – it's all good!!

In short – if we have your email address – you'll get access!



We're Trying Something New!!

We're going to allow folks to attend the Financial Planning and Investment Discussion Group meetings remotely via Zoom.



Some highlights of our plans...

- It will be an audio only session. (We may put a slide up on the screen or some such.)
- We'll be using an area mic to capture the discussion in the room
- Remote attendees can participate via voice -- we'll have a speaker connected so folks in the room can hear you
- We'll ask remote folks to mute themselves when not speaking
- The session will NOT be recorded
- We'll use the same link to zoom for all meetings



Our First Speaker...

Marcelo Espiritu

Director, Health Insurance Counseling & Advocacy Program,
Sourcewise

Marcelo Espiritu is the director of the Sourcewise Health Insurance Counseling & Advocacy (HICAP) Program. HICAP is a state-sponsored, volunteer-supported program that provides counseling to people with Medicare about their benefits, rights and options, and other health insurance-related questions.

Espiritu received state certification for Medicare HICAP counseling in 2010. Since then he has been an advocate for the elderly and individuals with disabilities who struggle with the complexity of Medicare and the myriad of options and decisions they face.

As the HICAP director, Espiritu supervises various HICAP counseling sites countywide. He is also responsible for recruiting and supervising HICAP volunteers, overseeing their counseling, outreach and community education activities.





Our Second Speaker...

John Buckingham

Chief Portfolio Manager, AFAM Capital; Editor, The Prudent Speculator newsletter

John Buckingham is editor of The Prudent Speculator investment newsletter. He also manages Al Frank Asset Management (AFAM)'s proprietary mutual funds.

Buckingham has been a part of AFAM since 1987 and is one of the company's largest shareholders. He has served as the firm's director of research since 1989 and chief portfolio manager since 1990..

Buckingham graduated magna cum laude from the University of Southern California in 1987 with a B.S. in computer science and a minor in business administration. Buckingham has appeared on numerous television and radio programs, is frequently interviewed by publications and conducts workshops at investment seminars.

