

The Financial Planning World

Where Would You Like Help?

Investing

PIP and IPS
 Asset classes
 MPT, EMH
 Portfolios
 Rebalancing

Retirement

IRAs
 Roth IRAs
 Cash-flow
 Withdrawals
 Bucket Strategies

Taxes

TRJA 2017
 QCDs
 Diversification
 Asset location

Insurance

Cost structure
 Social Security
 Medicare
 Train wrecks

Estate Planning

Wills and Trusts
 Power of Attorney
 Advance directives
 CA Right-to-die law



Very conservative ----- Moderately Conservative ----- Moderately Aggressive ----- Very Aggressive

Diversified portfolio

Contrarian strategies

Momentum strategies

Buy and rebalance

Value investing

Growth investing

Stock picking

Market timing

Consider Our Special Interest Groups!

Financial Planning Discussion Group

2nd Wednesday each month

<u>Investing</u>	<u>Retirement</u>	<u>Taxes</u>	<u>Insurance</u>	<u>Estate Planning</u>
PIP and IPS	IRAs	TRJA 2017	Cost structure	Wills and Trusts
Asset classes	Roth IRAs	QCDs	Social Security	Power of Attorney
MPT, EMH	Cash-flow	Diversification	Medicare	Advance directives
Portfolios	Withdrawals	Asset location	Train wrecks	CA Right-to-die law
Rebalancing	Bucket Strategies			

Investing Discussion Group

4th Monday each month

Computerized Mechanical Investing Group

1st Thursday each month

Very conservative ---- Moderately Conservative ---- Moderately Aggressive ---- Very Aggressive
 Diversified portfolio Contrarian strategies Momentum strategies
 Buy and rebalance Value investing Growth investing Stock picking Market timing

All discussion groups meet at Holder's Country Inn, 998 S. DeAnza Blvd., San Jose
 Order dinner from 6:00 to 6:30pm, discussion ends promptly at 9:00pm.