



Brad Thomas

Editor, Forbes Real Estate
Investor, Senior Research
Analyst, iREIT Investor

JOIN US AND LEARN

- Why income investors should consider and own real estate investment trusts (REITs)
- How to analyze REITs for dividend sustainability

REITS IN DEPTH

NEW LOCATION! See Inside for Details



625 N MICHIGAN AVE
SUITE 1900
CHICAGO, IL 60611-3151
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SILICON VALLEY
MEETING

Saturday,
February 9, 2019

Chapter Information

Email Lynn Gillette, aaichapter_siliconvalley@yahoo.com
Web Page www.aaii.com/localchapters
Website www.siliconvalleyaaii.org
Facebook www.facebook.com/sv.aaii
Meetup www.meetup.com/AAll-Silicon-Valley-Meetup
CIMI: <https://groups.yahoo.com/neo/groups/AAll-SV-CI-MI-Group/info>

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>. We meet and order dinner from 6:00 to 6:30 p.m., and the discussion ends promptly at 9:00 p.m. We plan to webcast these SIG meetings; for details see our chapter website at www.siliconvalleyaaii.org.

INVESTING DISCUSSION GROUP

Lynn Gillette and Valerie Fitch
aaichapter_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).

on the second Wednesday of each month, from September through June. A schedule of topics is available on our chapter website at www.siliconvalleyaaii.org.

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. See <http://tinyurl.com/pug8ybv> for further detail on CIMI.

FINANCIAL PLANNING DISCUSSION GROUP

Fred Smith
fred.svaaii@gmail.com

These meetings feature informal discussions on a broad range of financial planning topics including investing, taxes, retirement planning and more. We meet

Future Meeting

Saturday, March 9, 2019

Topic: **TODAY'S INVESTING**

Speaker: **Christine Benz**
Director of Personal Finance, Morningstar, Inc.

Future Meeting

Saturday, April 13, 2019

Topic: **CHARITABLE PLANNING IN A NEW TAX AND GIVING ENVIRONMENT**

Speaker: **Julia Reed**

REGISTER ONLINE

www.siliconvalleyaaii.eventbrite.com

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, February 9, 2019

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

Saturday, February 9, 2019

NEW! SHOUP PARK GARDEN HOUSE

400 University Avenue
Los Altos, CA 94022

SCHEDULE

Registration/Social 8:30 a.m.

Chapter Business 8:40 a.m.

Program 9:00 a.m.

Break 10:15 a.m.

Q&A 11:30 a.m.

FEES

In Advance

(Postmarked by 2/4; online by 2/7)
Everyone, **\$15**/person

At the Door

(space permitting)

Everyone, **\$20**/person

Persons under 25 (with ID), **Free**

Payment buys both physical and web
attendance

REFUND POLICY

No Refunds

More Information

Our meeting location is at the Garden
House at Shoup Park in Los Altos.

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: [http://www.
siliconvalleyaaii.org](http://www.siliconvalleyaaii.org)

**Forever ticket holders preregister
to get a guaranteed seat.**

**NO REFRESHMENTS WILL BE
PROVIDED.** Refreshments are not
available at this facility.

The AAI Silicon Valley Chapter Presents ...

Saturday, February 9, 2019

REITS IN DEPTH



Brad Thomas

*Editor, Forbes Real Estate Investor; Senior
Research Analyst, iREIT Investor*

YOU WILL LEARN

- Why income investors should consider and own real estate investment trusts (REITs)
- The tax-deferral advantages of many REITs
- How to analyze REITs for dividend sustainability

Brad Thomas is a prolific Seeking Alpha author and the editor of Forbes Real Estate Investor, a subscription-based newsletter, and the senior real estate investment trust (REIT) analyst at iREIT Investor.

Thomas is the highest-ranking analyst (based on page views) for Seeking Alpha (with over 40,000 followers) and Forbes.com.

Thomas is the author of two books, including "The Intelligent REIT Investor: How to Build Wealth with Real Estate Investment Trusts" (Wiley, 2016).

Real estate investment trusts (REITs) have consistently outperformed many more widely known investments. Over the past 15-year period, for example, REITs returned an average of 11% per year, better than all other asset classes. Since 2009, REITs have enjoyed positive returns; large-cap stocks and cash are the only other classes that paralleled that record. Even in 2015, a "year of fear" related to rising rates, REITs returned 2.4%, beating most all other asset classes. Prepare yourself, and your portfolio, to benefit from the demand for REITs that will follow the creation of a real estate global industry classification standard (GICS) sector. Brad Thomas will give his presentation in two parts.

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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