

## Chapter Information

### RESOURCES

**Contact** Fred Wallace, fredwallace77@gmail.com  
310-306-0911  
**Email** aaiichapter\_losangeles@yahoo.com  
**Web Page** www.aaii.com/localchapters  
**Website** www.aaiilosangeles.org

## Future Meeting Saturday, November 18, 2017

Topic: **DUAL MOMENTUM INVESTING FOR MORE PROFIT WITH LESS RISK**

Speaker: **Gary Antonacci**  
Author, "Dual Momentum Investing"; Founder, OptimalMomentum.com

Topic: **NAVIGATING THE ETF LANDSCAPE: INDEXING, SMART BETA AND THE FUTURE OF ETF INVESTING**

Speaker: **John Erdos**  
Vice President of Investment Management, BlackRo

## Future Meeting Saturday, January 20, 2018

Topic: **HOW TO BE READY FOR 2018**

Speaker: **Tom Petruno**  
Financial Writer and Columnist

Topic: **FINDING STOCKS WITH MORE REWARD THAN RISK**

Speaker: **Charles Rotblut, CFA**  
Vice President and Financial Analyst, AAI; Editor, AV Journal

Saturday, October 21, 2017



## THE 25 ESSENTIAL INVESTMENT SECRETS I PASSED ON TO MY SON

**Gatis Roze**  
Author, "The Traders Journal,"  
StockCharts.com, Inc.



## OBAMACARE? TRUMP CARE? LET'S JUST TALK ABOUT THE WORLD OF MEDICARE FOR 2018!

**Paul Davis**  
Paul Davis Insurance Agents

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 solicitations. There are no representations or warranties of any kind, expressed or implied, about the completeness, accuracy, reliability, or suitability of meeting information. Investment information presented may not be appropriate for all investors and should be independently verified.

## Special Interest Groups

Check the LA chapter website at [www.aaiilosangeles.org](http://www.aaiilosangeles.org) for latest schedules and details.

### RETIREMENT GROUP

**Evan Press**  
PressEL99@aol.com

Date/Time: First Saturday of odd-numbered months, 9:30 a.m.

Location: Culver City Veterans Memorial Complex, 4117 Overland Avenue, Culver City

### STOCK SELECTION GROUP

**Norm Langhout**  
normlang1@verizon.net  
310-391-6430

**New meeting location** effective October. Please call or email Norm Langhout.

### STRATEGIC INVESTING GROUP

**Jim Quinn**  
jqquinn1469@verizon.net

Date/Time: The first Saturday of even-numbered months, 9:00 a.m.

Location: Culver City Veterans Memorial Complex, 4117 Overland Ave., Culver City

## AAII 2017 INVESTOR CONFERENCE

**Loews Royal Pacific Resort  
Orlando, Florida  
Friday, November 3 –  
Sunday, November 5, 2017**

*Come a few days before or stay a few days after for the same great discount sleeping room rate (limited availability)*

### TOPICS INCLUDE:

Managing Your Money During Retirement • Combining the Best Stock Selection Factors • Investing in an Age of Volatility • Investing While in Retirement • AAI Shadow Stock Portfolio • Building a Diversified "Core" for Every Portfolio • The Value of Dividends

**Act today, event  
regularly sells out!**

### TO REGISTER:

Visit [www.aaii.com/Conference](http://www.aaii.com/Conference)  
Or call Member Services at **800-428-2244**



AAII Local Chapters



LOS ANGELES MEETING

**TWO TOPICS!** See inside for details



625 N MICHIGAN AVE  
SUITE 1900  
CHICAGO, IL 60611-3151  
800-428-2244



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Individual Investors

## REGISTER BY MAIL

ADVANCE REGISTRATION FOR  
Saturday, October 21, 2017

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

Family/Guest Name(s): \_\_\_\_\_

\_\_\_\_\_ # Members & Family: \$ \_\_\_\_\_

\_\_\_\_\_ # Nonmembers: \$ \_\_\_\_\_

**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 AAIL) to:

**AAIL Los Angeles Chapter**  
PO Box 854  
Santa Monica, CA 90406-0854

No confirmation will be sent; your  
canceled check is your receipt.

### Meeting Details

**Saturday,  
October 21, 2017**

#### SKIRBALL CENTER

2701 N. Sepulveda Blvd.  
Los Angeles, CA  
310-440-4500

#### SCHEDULE

**Registration/Social/  
Book Swap**

8:30 a.m.

**Program** 9:00 a.m.

#### FEES

**In Advance** (by 10/14)  
Everyone, **\$10/person**

**At the Door**  
(space permitting only)  
Everyone, **\$12/person**

#### REFUND POLICY

No Refunds

### More Information

Bring a friend or family  
member! First-time  
guests are ALWAYS  
**FREE!**

Our **Investment Book  
Swap Table** is a home  
run! Bring an investment  
book and swap it for  
another! The book swap  
table will be open at 8:30  
a.m., before the meeting,  
and at the break.



**Gatis Roze** is a veteran full-time stock market investor who has traded his own account since 1989. A renowned communicator, Roze writes the popular blog, "The Traders Journal," which is published at StockCharts.com and has a global following.

Roze is also co-author of "Tensile Trading: The 10 Essential Stages of Stock Market Mastery" (Wiley, 2016).

After several successful entrepreneurial ventures, he retired in his early 40s to focus on investing in the financial markets. With consistent success as a stock market trader, he began teaching investments at the post-college level in 2000 and continues to do so today.

Roze holds an MBA from the Stanford Graduate School of Business, is a chartered market technician (CMT) and is a past president of the Technical Securities Analysts Association (TSAA).

## THE 25 ESSENTIAL INVESTMENT SECRETS I PASSED ON TO MY SON

### Gatis Roze

Author, "The Traders Journal,"  
StockCharts.com, Inc.

#### YOU WILL LEARN

- The 25 money management secrets that you need to succeed in the market at any age
- The Roze "edge" that will help you find yours and explain how to thrive as an individual investor
- How a father motivated his son to take an interest in investing at a young age, and how their lessons learned can benefit you

This presentation is the result of a unique investing joint venture between father and son from two different generations resulting in consistent success in the stock market. You will learn what gives them an "edge" in the market and how you can find yours. Gatis Roze will also share the inspirational story of how a father motivated his son to take an interest in the financial markets at an early age, their most valuable lessons and insights generated from this unique partnership. Their story can help make you and yours better investors!

Saturday, October 21, 2017, the AAIL Los Angeles Chapter Presents ...



## OBAMACARE? TRUMP CARE? LET'S JUST TALK ABOUT THE WORLD OF MEDICARE FOR 2018!

### Paul Davis

Paul Davis Insurance Agents

#### YOU WILL LEARN

- Why it's important to shop annually for your Medicare plan
- How to go about choosing the most suitable plan(s) to augment Medicare
- What changes are coming in 2018 and what to do about them

**Paul Davis** has been in the insurance business for 33 years, 27 as an independent agent. His mission is to educate and ensure people get the best value for their insurance dollar.

Davis is a recognized expert on Medicare and has given numerous presentations to various groups and associations.

Davis is a graduate of the University of Southern California Marshall School of Business.

Do you have questions about Medicare health plans? Paul Davis is an expert and has all the answers in this educational presentation. Once you are eligible for Medicare, what's the best solution for coverage? Your group plan? Your retiree plan? A Medicare Advantage or Medicare Supplement Plan? The goal is to find the plan that suits your needs and budget and allows you to see the doctors and hospitals you want and cost effectively cover the prescription drugs you are using. Davis researches the Medicare landscape each year to ensure clients are getting the best value for their money.