

AAIL Journal 2003 Index of Articles

For all of our print-based readers, we present below an index of all of the articles that appeared in 2003, arranged by subject. If you want to search for articles in prior years, visit our Web site at www.aail.com, where you will find an extensive library of previous AAIL Journal articles. The archives include a valuable search engine that will allow you to research articles by subject, author, issue date and text.

Special Features

- Jan Discount Broker Survey 2003: A Guide to Commissions and Services, by Jean Henrich
- Jun Investing in DRPs: A Guide to Dividend Reinvestment Plans, by AAIL Staff
- Sept AAIL's Guide to the Top Investment Web Sites, 7th Edition, 2003, by AAIL Staff
- Oct The Individual Investor's Guide to Exchange-Traded Funds, by Maria Crawford Scott & Jean Henrich

A Matter of Opinion—James B. Cloonan

- Apr The AAIL Beginner's Portfolio: An Annual Performance Review
- Sept New From AAIL: Specific Guidance on Stock and Fund Selection
- Nov Focus on the Individual Investor's Shadow Stock Portfolio

Bonds

- Jan Maximizing Your Profits When Investing in Bonds, by Hildy Richelson & Stan Richelson
- Feb In Today's Investment Environment, Bank CDs Deserve a Fresh Look, by James Gilkeson, Gary Porter & Stanley Smith
- Feb Putting Together a Portfolio of Municipal Bond Investments, by Annette Thau
- Apr How to Shop for Bonds: Pricing Munis on the Internet, by Annette Thau
- Oct Are Junk Bonds for You? A Look at High-Yield Bonds, by Annette Thau

Estate Planning—Ellen J. Boling & Tracy Tinnemeyer

- Apr Reassessing Your Risk Tolerance? Don't Overlook Estate Planning
- Jun The Tools of the Trade: Basic Estate-Planning Trusts
- Nov Advanced Estate Planning: Split-Interest Gifts and Trusts

Financial Planning

- May The 10 Fundamental Axioms for Effective Retirement Investing, by Jack Griggs, William P. Dukes & J. William Petty
- Aug How to Make Personal Finance "Connect" With Young Adults, by Paula Hogan

Insurance Products—Peter Katt

- May A Life Settlement Update; and Life Insurance in Pension Plans
- Jul The Potential Problems With No-Lapse Premium Guarantees
- Nov Variable Life Insurance: Be Wary of Policy 'Delusions'

Investment Newsletters—Mark Hulbert

- May The Price-Value Relationship: Do You Get What You Pay For?
- Jul Just How Difficult Is It to Time the Bond Market?
- Sept Are We in a Bull Market Beginning or a Bear Market Correction?

The Markets

- Jan A Look at the Big Picture: Measures of Market Breadth, by Wayne A. Thorp
- May Telling Curves: What Bond Yields Reveal About the Markets, by Wayne A. Thorp
- Jun The Big Picture: How to Determine the Stock Market's Direction, by William J. O'Neil
- Aug Stocks and the Economic Cycle: What Performs Well—and When, by Wayne A. Thorp
- Aug The Top 10 Economic Indicators: What to Watch and Why

Mutual Funds

- Jan New Horizons: Introducing Exchange-Traded Bond Funds, by Albert J. Fredman
- Apr Micro-Cap Mutual Funds: Searching for the Future Giants, by John Markese

Mutual Funds (continued)

- Jul Top Funds Over Five Years: Analyzing How They Got There, by John Markese
- Jul Taking the Load Off of "Must Have" Fully Loaded Funds, by John Markese
- Nov Searching for Dividend Yield From Your Stock Mutual Funds, by John Markese

Portfolio Makeover

- Jan A Top-Down Financial Review: Where the Risks Are Lurking, by Paula H. Hogan, CFP, CFA
- Apr Will Their Retirement Assets Last? Analyzing the Chances for Success, by Dennis Stearns
- Jun Inherited Stocks Raise Issues for Couple Nearing Retirement Age, by Clark M. Blackman II
- Jul Will Their Portfolio Last? The Rest of the Story, by Dennis Stearns
- Aug Can They Maintain Their Lifestyle? Retired Couple Seeks Assurance, by Loyd J. Stegent
- Oct A Full Financial Planning Plate: Kids, Parents and Retirement, by Karen C. Altfest

Portfolio Manager Interview

- Feb Another Interview With Donald Yacktmann, President and Portfolio Manager, The Yacktmann Fund
- Apr An Interview With Gus Sauter, Portfolio Manager, Vanguard Index Funds
- May An Interview With Patrick J. English, Portfolio Manager, FMI Common Stock Fund
- Jun An Interview With Theodore T. Southworth, Northern Income Equity Fund
- Jul An Interview With Peter Spano, Portfolio Manager, Preferred International Value
- Aug An Interview With Alexander Thorndike, Portfolio Manager, Century Small Cap Select Fund
- Sept An Interview With Bill Ricks, Portfolio Manager, AXA Rosenberg International Small Capitalization Fund
- Nov An Interview With Kent Gasaway, Portfolio Manager, Buffalo High Yield Fund

Portfolio Strategies

- Feb 10 Lessons You Should Learn From Recent Market History, by William Reichenstein
- May Bear Market Strategies: Watch the Spending, Hold the Stocks, T. Rowe Price
- Aug The New Tax Act: Should You Revamp Your Portfolio?, by Maria Crawford Scott
- Oct The Shrinking Equity Premium and What It Means to Investors, by Paula Hogan
- Nov Allocation During Retirement: Adding Annuities to the Mix, by William Reichenstein

Retirement Planning

- Jul Retirement Planning: Annuities and When They May Make Sense, by William Reichenstein
- Jul The Big Pension Plan Hole and What It Means to Investors, by Edwin D. Everett

Stock Screening—John Bajkowski and Wayne A. Thorp, CFA

- Jan Stock Strategy Performance: Winners and Losers in 2002
- Feb Out of Wall Street's Spotlights: AII's 2003 Shadow Stock Listing
- Feb Shadow Stock Rookies: What the Newcomers Look Like
- Apr How to Use the CAN SLIM Approach to Screen for Growth Stocks
- May The Muhlenkamp Stock Screen: High ROEs at a Reasonable Price
- Jun Implementing a High-Yield Screen to Invest in Stocks With DRPs
- Jul Searching for the Upcoming Stock Market Winners
- Aug How the Strategies Have Fared: A Mid-Year Performance Review
- Sept AII's Low Price-to-Sales Screen: Strong Performer in Mixed Market
- Oct IBD Stable 70: Surviving Downturns With Long-Term Earnings Growth
- Nov Keeping a Pulse on Expectations: Screening for Earnings Revisions

Stock Selection Strategies

- Feb The Predictive Power of Price-Earnings and Price-Sales Ratios, by Richard Goedde
- Oct Four Basic Steps to Gauging a Firm's True Financial Position, by Jay Tapania, CFA
- Nov An Investor's Guide to Corporate Insider Trading Activity, by John Deysher

Tax Strategies

- Sept The New Tax Act: Planning Opportunities and Pitfalls, by Ellen J. Boling & Tracy Tinnemeyer