

AAll Investor Conference360

September 30 – October 1
(Boot Camps on September 29)

<https://conference.aall.com>

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September 30 – October 1
(Boot Camps on September 29)

- This year's conference is virtual
- You can attend from the location of your choice
- All sessions will be recorded and can be watched on demand

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- The conference can be accessed from the device of your choice
- Computers (PCs or Macs) are recommended
- A link to access the conference will be sent to attendees next week

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- This will be an interactive experience
- Attendees will be able to ask speakers questions
- Attendees will also be able to interact with other AAll members

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Keynote Speakers

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Keynote Speaker

September 30, 9:00 AM-10:00 AM

More Straight Talk on Investing: Getting to Boca



Jack Brennan
Chairman Emeritus
Vanguard

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Keynote Speaker

October 1, 9:00 AM-10:00 AM

**20 Things You Should Know About
Small-Cap Value****Paul Merriman***President*
The Merriman Financial
Education Foundation

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Keynote Speaker

October 1, 4:00 PM-5:00 PM

Money After Retirement**Terry Savage***Author, "The Savage Truth on
Money" & Financial Columnist*
Terry Savage Productions, Ltd.

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September 30, 10:15 AM-11:15 AM

Factor Investing Panel Discussion

**Chris Pedersen**

Director of Research
The Merriman Financial
Education Foundation

**Larry Swedroe**

Chief Research Officer
Buckingham Wealth Partners

**Jack Vogel**

Co-CIO
Alpha Architect

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October 1, 11:30 AM-12:30 PM

Retirement Investing Panel Discussion

**Christine Benz**

Director of Personal Finance
Morningstar, Inc.

**Paul Merriman**

President
The Merriman Financial Education
Foundation

**Roger Young**

*Vice President and Senior
Retirement Insights Manager*
T. Rowe Price

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- Three keynotes
- Two panels
- 20+ breakout sessions
- Plus, a special plenary session

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Harry Kraemer
Professor of Management
Northwestern University
Kellogg School of
Management

September 30, 6:30 PM-7:30 PM

Leading in Crisis Both Personally and Professionally

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Retirement Investing

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Jack Brennan
Chairman Emeritus
Vanguard

Retirement Investing

September 30, 9:00 AM-10:00 AM

More Straight Talk on Investing: Getting to Boca

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Ed Slott
President
Ed Slott and Company

Retirement Investing
September 30, 2:45 PM-3:45 PM

The New Retirement Savings Time Bomb: 5 Easy Steps to Take Control

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October 1, 11:30 AM-12:30 PM

Retirement Investing Panel Discussion



Christine Benz
Director of Personal Finance
Morningstar, Inc.



Paul Merriman
President
The Merriman Financial Education Foundation



Roger Young
Vice President and Senior Retirement Insights Manager
T. Rowe Price

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Stock Selection

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Robert Hagstrom
*Chief Investment
Officer/Senior Portfolio
Manager*
EquityCompass Investment
Management

Stock Selection

September 30, 2:45 PM-3:45 PM

Warren Buffett: Inside the Ultimate Money Mind

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Wayne A. Thorp
Senior Financial Analyst
AAll

Stock Selection
September 30, 1:30 PM-2:30 PM
Screening Like a Stock Superstar

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September 30, 10:15 AM-11:15 AM

Factor Investing Panel Discussion



Chris Pedersen
Director of Research
The Merriman Financial Education Foundation



Larry Swedroe
Chief Research Officer
Buckingham Wealth Partners



Jack Vogel
Co-CIO
Alpha Architect

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Income Investing

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Derek J. Hageman
*Financial Analyst and
Product Manager of AAll
Dividend Investing
AAll*

Income Investing

September 30, 4:00 PM-5:00 PM

Dividend Investing in a Low-Yield Environment

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Aaron Brask
Financial Planner
Aaron Brask Capital

Income Investing

September 30, 11:30 AM-12:30 PM

Using Income Annuities in Retirement

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Brian Haughey
Associate Professor of
Finance and Director of the
Investment Center
Marist College

Income Investing

September 30, 1:30 PM-2:30 PM

Bond Investing in a Low-Interest-Rate Environment

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Market Outlooks

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Sam Stovall
Chief Investment Officer
CFRA Research

Market Outlook

October 1, 10:15 AM-11:15 AM

Strong Start, Favorable Finish

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James Paulsen
Chief Investment Strategist
The Leuthold Group

Market Outlook
October 1, 2:45 PM-3:45 PM
**Economic & Financial Market
Outlook 2022**

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Boot Camps

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Charles Rotblut
AAII Journal Editor
AAII

Portfolio Strategies Boot Camp
September 29, 10:00 AM-12:45 PM

Seven Ways to Build and Maintain Wealth

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Wayne A. Thorp
Senior Financial Analyst
AAII

Stock Analysis Boot Camp
September 29, 2:30 PM-5:15 PM

Determining a Stock's True Worth—Practical Stock Analysis & Valuation

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How to Access the Conference

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- We've teamed up with Cvent
- Attendees will be sent a URL to access the conference
- Navigation is easy
- All sessions will be recorded and viewable on demand

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Let's Hear From the Speakers

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Excited? Register Today!

<https://conference.aaii.com>

We'll send you a free special report immediately after registering.

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Upcoming Webinars

Register at
www.aaii.com/webinars

Taking a Break for AAII Investor Conference 360

Wednesday, September 29, 2021

No regular Wednesday Webinar—join us at the conference.

AAII Investor Conference 360 Wrap-Up

Presented by John Bajkowski

Wednesday, October 6, 2021

7:30 PM CDT