

AAIL INVESTOR CONFERENCE

October 25 – 27, 2019

PLUS Pre-Conference Boot Camp Oct. 24
Omni Orlando Resort at Championsgate | Orlando, FL

Details online: www.aail.com/LCconference

A Selection of Our Exciting 2019 Speakers:



Keynote Speaker
James O'Shaughnessy
Author, "What Works on Wall Street";
O'Shaughnessy Asset Management, LLC



Keynote Speaker
James Paulsen
Popular Markets Commentator & Chief Investment Strategist,
Leuthold Group, LLC



Christine Benz
Director of Personal Finance,
Morningstar, Inc.



Ralph Acampora, CMT
Instructor, New York Institute of Finance

What You'll Learn

This special AAIL event teaches you the concepts and ideas you need to be a better investor such as:

- Picking winning stocks
- Protecting your portfolio
- Developing strategies to invest successfully
- Profitable investment sectors
- Becoming an educated computerized investor
- Tools and approaches for those nearing retirement
- And much more!

25 Investor Seminars | 30 Workshops

If you have ever wanted to know how to diversify your portfolio, choose the stocks best suited for you or create a retirement plan, this program gives you all of that and more.

Go directly to
the AAIL Investor
Conference site:



Registration is filling up fast!

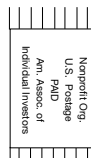
www.aail.com/LCconference | 800-428-2244



Thursday, September 19, 2019
**MEDICARE 101: HOW TO
AVOID COSTLY MEDICARE
MISTAKES**
Melinda A. Caughill
CMO and Co-Founder, 65 Incorporated
and 165



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



NEW LOCATION! See Inside for Details

AAIL Local
Chapters

MILWAUKEE
MEETING

Chapter Message

Welcome to the beginning of the 2019–2020 season for the AAIL Milwaukee Chapter. We are pleased to present quality speakers for the upcoming season. Watch for additional information in the mail or on the chapter website. If you have suggestions for future speakers and/or topics, please contact me by phone (414-453-9877) or by email (kmccombe@aol.com). I hope you can attend the September meeting with Melinda Caughill on Medicare. This meeting will be eligible for CPA CE credit and will be promoted on the Wisconsin FPA website, so we may have increased attendance. Please send your RSVP today.

—Kathy McCombe, Chapter President

**Plug into the investing community
with your local chapter!**

Face-to-face investment education
from renowned local and national speakers.

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Thursday, September 19, 2019

Name: _____

Email: _____

Phone: (_____) _____

Family/Guest Name(s): _____

_____ # Members & Family: \$ _____

_____ # Nonmembers: \$ _____

_____ # Students: \$ _____

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 Milwaukee Chapter
PO Box 1204
Milwaukee, WI 53201-1204

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

Meeting Details

**Thursday,
September 19, 2019**

NEW LOCATION! SHERATON

**Milwaukee-Brookfield
Hotel**

375 S. Moorland Rd.
Brookfield, WI 53005
262-364-1100

SCHEDULE

Registration/Social
6:00 p.m.

Program 7:00 p.m.

FEES

In Advance (postmarked
by 9/13) AAIL Member &
Member's Family,
\$15/person;
Nonmembers, **\$20/**
person
Students, **\$10/person**

At the Door
(space permitting)
Everyone, **\$20/person**

REFUND POLICY

No Refunds

More Information

Driving Directions

From downtown
Milwaukee, take I-94
westbound to Moorland
Rd, north exit.

The AAIL Milwaukee Chapter Presents ...

Thursday, September 19, 2019



MEDICARE 101: HOW TO AVOID COSTLY MEDICARE MISTAKES

Melinda A. Caughill

*CMO and Co-Founder, 65 Incorporated
and i65*

YOU WILL LEARN

- Three myths about Medicare or health care in retirement
- The six steps of Medicare enrollment
- The consequences of mistiming Medicare enrollment

For more than 15 years, **Melinda Caughill** has worked in the Medicare landscape. First, helping to provide the nation's home health care companies with educational tools and resources they need to comply with changing Medicare regulations. And now helping consumers get the expert, unbiased Medicare guidance they need to avoid costly, permanent mistakes.

Since the launch of i65, Caughill has delivered more than 200 Medicare-related educational webinars to financial advisers.

Today, through her companies, 65 Incorporated and i65 LLC, Caughill uses her extensive experience to provide baby boomers, seniors and their families with unbiased, individualized Medicare enrollment guidance through fee-for-service consultations and online software.

Three point six million Americans turn 65 each year and become eligible for Medicare. Unfortunately, for most of these people, Medicare remains a mystery. According to a recent study, 93% of people aged 55-64 admitted that they don't understand Medicare at all. Eighty-one percent of people already on Medicare said they don't have ample knowledge about the program.

This lack of understanding translates into costly and permanent Medicare mistakes. Just one mistake could LITERALLY cost you thousands of dollars a year for the rest of your life and even keep you from getting needed health care services. Put a stop to Medicare mistakes by attending this nationally praised presentation.

Chapter Information

Contact Kathy McCombe, kmccombe@aol.com, 414-453-9877

Email aailchapter_milwaukee@yahoo.com

Web Page www.aail.com/localchapters

Special Interest Group

MADISON

Scott Snyder

608-609-1762

skennedys@icloud.com

Date: Wednesday, September 18, 2019

Time: 6:00-8:00 p.m. (check-in begins at 5:30)

Cost: No charge; free and open to the public

NEW! Location: Oakwood Village University Woods Center for Arts and Education, 6205 Mineral Point Road, Madison, WI 53705

Speaker: Melinda A. Caughill, CMO, Co-Founder 65 Incorporated and i65

Topic: The Road to Medicare: How to Avoid Costly Medicare Mistakes that Can Stall Your Retirement

Presentation: Gain a solid understanding of how Medicare is structured and the choices that you must make.

Future Meeting

Thursday, October 17, 2019

Topic: **ASSET ALLOCATION STRATEGIES FOR LEVEL3**

Speaker: **John Bajkowski**

Future Meeting

Thursday, November 21, 2019

Topic: **TBD**

Speaker: **TBD**

Future Meeting

Saturday, January 18, 2020

Topic: **30TH ANNUAL MIDWINTER RETREAT**

Speaker: **5 Speakers**