Chapter Information

RESOURCES

Contact Brian Livingston
Email aaiichapter_pugetsound@yahoo.com
Web Page www.aaii.com/localchapters
Website sites.google.com/site/pugetsoundchapter
Email Newsletter www.eepurl.com/TWyhL

BOARD OF DIRECTORS

President	Brian Livingston
Vice President & Treasurer	Doug Chin
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Publicity Committee	Marty Eskenazi (editor), Diana Chin, Bryan Edgar, Lester Herrera, Drew Thoresen
SIG Leaders	Jim Shaw, Lowell Wickman

Special Interest Groups

SEATTLE-TACOMA SIG

mailbyte-SeaTacSIG@yahoo.com

For those in Seattle, Tacoma, or South Sound, this group (formerly South Sound SIG) will meet in Federal Way on Oct. 15, 2016, at 11:00 a.m. The speaker will be investment adviser Laura Kokesh. For details, please email the contact address.

EASTSIDE GROUP

Jim Shaw
JGShaw@CalAlum.org

This discussion group meets in Bellevue or Mercer Island at 7 p.m. on the second Tuesday of each month (except in July and August). To receive a notice prior to each meeting, please subscribe at groups.yahoo.com/group/AAIIEastsideSIG.

NORTH END GROUP

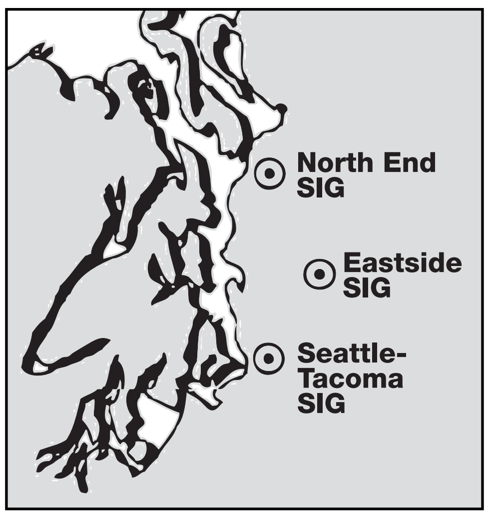
Lowell Wickman
wick912yukon@hotmail.com

For those who live north of Seattle, this discussion group meets in Lynnwood once a month. Please preregister by contacting Lowell Wickman.

Chapter Message

Please join us at the new Sea-Tac SIG! (See description at left.)

—Brian Livingston, chapter president



STOCK SELECTION FOR VALUE AND GROWTH PORTFOLIOS

REGISTER ONLINE! *See Inside for Details*

Wayne A. Thorp, CFA
Vice President and Senior Financial Analyst, AAII

JOIN US AND LEARN

- How to develop a screening strategy that meshes with your horizon, risk tolerance, analytical skills and time constraints
- Which stock screening techniques work and which ones should be avoided

AAII Local Chapters

PUGET SOUND **MEETING**

Saturday
September 17, 2016
9:45 a.m.

AAII AMERICAN ASSOCIATION OF INDIVIDUAL INVESTORS®
625 N MICHIGAN AVE
SUITE 1900
CHICAGO, IL 60611-3151
(800) 428-2244

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Individual Investors

REGISTER ONLINE

aaiips.eventbrite.com

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, September 17, 2016
9:45 a.m.

Name:____________________________

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Email: ___________________________

Phone: (______)________________

Family/Guest Name(s): __________

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Total Registrants: #______

Total Contribution: $______

Please indicate any ADA disability needs: ______________________

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Mail completed form with your check (payable to AAII) to:

AAII Puget Sound Chapter
P.O. Box 1586
Mercer Island, WA 98040

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

Meeting Details

Saturday, September 17, 2016

MERCER ISLAND COMMUNITY & EVENT CENTER

8236 SE 24th Street
Mercer Island, WA 98040-2235
206-236-3545

SCHEDULE

Registration/Social 9:30 a.m.
Program 9:45 a.m.-12:45 p.m.

FEES

In Advance
(postmarked by 9/12 or online at least 48 hours before the presentation at aaiips.eventbrite.com)
Contribution of **any amount**

At the Door
(space permitting, max 200)
Contribution of **any amount** will be accepted as cash, check or money order.

REFUND POLICY

Send us an email no later than 24 hours before the event to request a refund of an online registration or a check sent by mail.

More Information

Please preregister as early as possible to help us plan for attendance.

Make a contribution of **any amount** for each person who will attend. The more you contribute, the better the speakers we can bring to you.

Each One Bring One
Every AAII member who preregisters is entitled to bring a guest who has never attended a seminar. Your guest will not be asked for any contribution.

Driving Directions
http://binged.it/1QVDXon

The AAII Puget Sound Chapter Presents...

Wayne A. Thorp, CFA, is vice president and senior financial analyst of AAII and also the former editor of *Computerized Investing* (CI). He has written extensively on technical analysis, stock screening and stock analysis. He oversees the CI Market Dashboard and writes the commentary. Thorp is also product manager for the *Stock Investor Pro* computerized stock analysis program and a member of the advisory committees for the *Stock Superstars Report* (SSR) and *Dividend Investing* (DI).

Follow him on Twitter: @WayneTAAII.

Saturday, September 17, 2016, 9:45 a.m.

STOCK SELECTION FOR VALUE AND GROWTH PORTFOLIOS

Wayne A. Thorp, CFA

Vice President and Senior Financial Analyst, AAII

YOU WILL LEARN

- How to develop a screening strategy that meshes with your horizon, risk tolerance, analytical skills and time constraints
- Which stock screening techniques work and which ones should be avoided
- Which value and growth strategies have had the best performance in AAII's 25-year study of over 50 strategies

Even though successful money managers may differ in their investing philosophies, a disciplined approach to selecting and pruning investments is a common characteristic. Wayne Thorp, CFA, will show how computerized stock screening systems can be used to reduce a large universe of stocks into a manageable group of prospects that match your investment style. He will describe the process of developing and implementing both a value and a growth screen, using AAII's *Stock Investor Pro* fundamental stock screening and research database program. After narrowing down the stock universe to a more manageable set of companies, Thorp will discuss "What next"? Using real-world examples and some of today's most useful financial websites, Thorp will show you how to perform a step-by-step analysis of a company to decide whether it's right for your portfolio.