

Saturday, January 10, 2015

THE AAIL PHOENIX CHAPTER PRESENTS ...

COVERED CALL WRITING TO GENERATE MONTHLY CASH FLOW

discussed by: **DR. ALAN ELLMAN**

President, The Blue Collar Investor Corp.

The presentation is an easy-to-understand approach to mastering covered call writing. This is a strategy that combines both stock (buying) and option (selling) investing. It is geared to the average retail investor with the goal of taking control of your financial future by generating monthly cash flow. This seminar will take the mystery out of an investment approach that the government deems appropriate to use in your self-directed IRA accounts.

A financial book door prize drawing will be conducted at the end of the morning session.

ATTEND THIS MEETING & LEARN:

- How to use fundamental and technical analysis as well as commonsense principles to select the greatest covered call stock candidates
- How to use the Ellman Calculator to make your stock and option selections
- How to use a series of exit strategies to mitigate losses and maximize gains

ABOUT DR. ALAN ELLMAN

Dr. Alan Ellman is president of The Blue Collar Investor Corp. and author of three best-selling books on the subject of covered call writing. His fourth book, "Stock Investing for Students" (Digital Publishing of Florida, 2013), is now required reading at the University of Maryland. He has also produced several DVD and CD educational programs on this subject. Over the past few years, Ellman has been a frequent guest on financial programs such as Jordan Kimmel's Voice America Business Radio Program. He has also been a national speaker for The Money Show and the Stock Traders Expo, and has spoken at several AAIL chapters throughout the country. Ellman wears many hats, as he is also a retired general dentist, a licensed real estate salesperson, a certified personal trainer and has successfully completed the Series 65-Investment Advisor Rep requirements. Ellman's passion is his desire to educate average retail investors how to become CEOs of their own money using his favorite strategy: covered call writing.

The opinions of speakers are their own and not necessarily those of AAIL. It is not the policy of AAIL 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. Investment information presented may not be appropriate for all investors and should be independently verified.

MEETING DETAILS

SATURDAY, JANUARY 10, 2015

Franciscan Renewal Center

5802 E. Lincoln Dr., Scottsdale, AZ 85253

480/948-7460; www.maps.yahoo.com and www.thecasa.org

Registration/Social/Refreshments, 9:00 a.m.

Program and Q&A, 9:30 a.m.-11:20 a.m.

(See afternoon subgroup schedule on back page)

In Advance (by 1/7)

AAIL Members, Member's Family, **\$9/person**; Nonmembers, **\$11/person**

At the Door (space permitting) Everyone, **\$15/person**

The afternoon subgroup meetings are included in the meeting fee.

Refunds To cancel and receive a refund, email Roger Carter, AAIL@asu.edu, at least three days before the meeting date.



CHAPTER INFORMATION

Chapter Contact, Allen Reamer, areamer@mindspring.com, 623/544-8425

Chapter Email Address, aailchapter_phoenix@yahoo.com

Chapter Web Page, www.aail.com/localchapters



FUTURE MEETINGS

Saturday, February 7, 2015

Speaker: Jackie Ann Patterson, editor of Back Door Testing

Topic: "Techniques for Top-Down Investing and Trading"



Saturday, March 7, 2015

Speaker: Charles Rotblut, editor of the *AAIL Journal*

Topic: "Smart Investing: Seeking Reward While Reducing Risk"

Saturday, April 11, 2015

Speaker: Alan F. Willenbrock

Topic: "Municipal Bonds"



Mail completed advance registration form with your check (payable to AAIL) to:
AAIL Phoenix Chapter
Roger Carter, Registrar
2930 East Acoma Dr.
Phoenix, AZ 85032-5009

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

Phoenix Chapter Advance Registration: Saturday, January 10, 2015

REGISTRANTS/TOTAL FEES

_____ AAIL Member & Family \$ _____

_____ Guests (Nonmembers) \$ _____

Total Fees \$ _____

REGISTRANT INFORMATION (PLEASE PRINT)

Registrant Name _____

Email _____

Phone (____) _____

Guest Name(s) _____

Please indicate any ADA disability needs

() YES, I would like more information about
volunteering to help this chapter plan and
present investment education programs.

SUBGROUPS

Personal Finance and Retirement Income Planning SIG, Saturday, January 10, 2015, 1:00 to 2:00 p.m. (after the chapter meeting). Contact: Dr. Joyce Morningstar, jmorningstar@dynamicwealthadvisors.com. Same date and location as chapter meeting. Cost: None.

Due to greater uncertainties, financial planning after retirement becomes more challenging. One of the major challenges retirees face is overcoming the cognitive errors that lead to irrational decisions and behavior harmful to someone's long-term financial health. This season, our focus on financial planning and sensible investing to produce retirement income will build on what we learned last season about recognizing common investor biases. In financial planning, one size does not fit all, so there's no "silver bullet" for investing. Our group welcomes different viewpoints and participation from both experienced and new investors.

Options & Analysis SIG, Saturday, January 10, 2015, 2:20-3:20 p.m. (after the chapter meeting). Contact: Lowell Carty, lowell39@msn.com. Same date and location as chapter meeting. Cost: None.

All AAI participants are invited to improve their wealth-building and management skills through the use of option instruments and analysis tools. You will benefit from a combination of tutorial presentations and active discussions. These range from use of options to generate monthly income to "hedging" for protection of your stocks and portfolios. Participant depth ranges from initial learning to active traders. You are welcome to join our quest to combat the unprecedented market changes and uncertainties. We work closely with the Stocks and ETFs SIG.

Health Care Reform and Medicare SIG, (after the chapter meeting in December, February and April). Contact: Dr. Alan Ellman, allanlee@ar-group.com. Same date and location as chapter meeting. Cost: None.

The Affordable Care Act, commonly referred to as Obamacare, has been in effect for one year. Open enrollment for 2015 began November 15. Premiums are up and a few new carriers have entered the market. It's still too early to tell what the enrollment results will be for 2015. The debate continues as to the success of the law and the future of health care in the U.S. What's the future of the individual market and employer group insurance? How has Medicare been affected? Can Medicaid handle the huge enrollment numbers? Join us for an informative and spirited discussion.

Stocks and ETFs SIG, Saturday, January 10, 2015, 1:15-2:15 p.m. (after the chapter meeting). Contact: Beatrice Kenney, beakenney@yahoo.com, 480/406-8942. Same date and location as chapter meeting. Cost: None.

The goal of this SIG is to create smarter, better-informed, successful traders

and investors through experiences with high-quality stock trading information. Independent traders and successful investors will present their methods and strategies of trading. Charting tools and tactics will help traders and investors profit from investments and trades. Investor psychology, portfolio strategies and handling potential losses are some of the subjects covered. We work closely with the Options & Analysis SIG.

Vector Vest SIG, third Saturday of every month, 9:00 to 11:00 a.m. Contact: Eugene Almer, 602/300-4573. Location: Gloria Dei Lutheran Church, 3539 E. Stanford Dr., Paradise Valley, AZ 85253. Cost: \$5

This SIG focuses on the use of the VectorVest system for equity investing strategies and market timing. Most meetings include a discussion of the current market conditions and what to expect in the month ahead using VectorVest tools, several educational presentations by members describing their experiences with various parts of the VectorVest System, and discussions and analysis of selected investment strategies and/or equities of interest to the members.

Investment Protection SIG, Saturday, January 10, 2015, 3:25 -4:25 p.m. (after the chapter meeting). Contact: Fred Artus, artusfred@gmail.com, 207/997-3657. Same date and location as chapter meeting. Cost: None

The Investment Protection (IP) SIG focuses on wealth protection in perilous times. Foreseeable market volatility, inflation and other factors promise significant wealth destruction for the uninformed. Improved skills and strategies can help protect your portfolio and increase your wealth. The IP SIG will complement the fundamental work of the Stocks & ETFs SIG and the Options & Analysis SIG. Each SIG uses meetings and the electronic form to teach new skills.

Brunch Bunch SIG, third Wednesday of the month, May through September, 10 a.m. to noon. Optional lunch. Contact: Dr. Joyce Morningstar, jmorningstar@dynamicwealthadvisors.com. Location: Dynamic Wealth Advisors, 8655 E. Via de Ventura, STE G-200, Scottsdale, AZ 85258. Cost: None.

Join us for lively discussions on current events in the financial world. We will learn from each other as we discuss sharing our experience and knowledge. The conversation continues for those who wish to go to lunch afterward. We welcome different viewpoints and participation from both experienced and new investors.



**625 N. MICHIGAN AVE., SUITE 1900
CHICAGO, IL 60611-3151**

The American Association of Individual Investors is an independent nonprofit corporation formed in 1978 for the purpose of assisting individuals in becoming effective managers of their own assets through programs of education, information and research.

■ AAIL RECORDS INDICATE THAT YOU ARE SIGNED UP FOR THE MEETING ANNOUNCEMENT MAILING LIST(S) OF THE FOLLOWING CHAPTER(S). TO MAKE A CHANGE, CONTACT MEMBER SERVICES, 312/280-0170 OR 800/428-2244.



AAII PHOENIX CHAPTER MEETING

Saturday, January 10, 2015

COVERED CALL WRITING TO GENERATE MONTHLY CASH FLOW

discussed by:

DR. ALAN ELLMAN
President, The Blue Collar Investor Corp.

REASONS TO ATTEND

- Get a FREE DVD describing how to avoid the most common mistakes made by covered call writers
- Get a FREE copy of the Ellman Calculator
- Access special discounts on educational material