

Chapter Information

RESOURCES

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

Email aaiichapter_phoenix@yahoo.com

Web Page www.aaii.com/localchapters

LEADERS

President	Allen Reamer
Vice President	Roger Carter
Treasurer	Kevin McGuire
Secretary	Sandy Salopek
Registrar/Membership Chair	Roger Carter
Hospitality Chair	Karen Kamenir
Program Chair	Allen Reamer
Webmaster	Roger Carter

Chapter Message

If you registered for the cancelled October 3 meeting, you are automatically registered for this meeting.

If you were registered for the October 3 meeting and cannot attend the October 10 meeting, contact Roger Carter, registrar, at AAI@asu.edu for a refund.

If you wish to wish to register for this meeting, use your October 3 registration form, due October 7, or register on site.

Future Meeting Saturday, November 21, 2015

Topic: **FIVE INVESTING RULES THAT WILL KEEP YOU OUT OF TROUBLE**

Speaker: **Nancy Tengler**
Financial I.Q. Training Services

Future Meeting Saturday, December 5, 2015

Topic: **THE RISK VS. RETURN CONUNDRUM**

Speaker: **Alan Snyder**
*Founder and Managing Partner,
Shinnecock Partners*



Paul Deloughery
Senior Attorney, Magellan Law

INTRODUCTION TO CREATING A FAMILY DYNASTY

Saturday, October 10, 2015

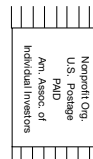


625 N MICHIGAN AVE
SUITE 1900
CHICAGO, IL 60611-3151
800-428-2244

REGISTER EARLY & SAVE! See inside for details

AAII Local
Chapters

PHOENIX
MEETING



Monthly Special Interest Groups

VECTOR VEST

Contact: Eugene Almer, 602/300-4573.

Third Saturday of every month, 9:00 to 11:00 a.m.

Location: Gloria Dei Lutheran Church, 3539 E. Stanford Dr., Paradise Valley, AZ 85253.

Cost: \$5

The VectorVest system for equity investing strategies and market timing is used to discuss current market conditions and what to expect in the month ahead. Members also describe their experiences with various parts of the VectorVest System and analyze selected investment strategies and/or equities of interest.

Free!

Sign up to receive **the latest chapter meeting information** by mail and email.

IT'S EASY!

Go to **www.aaii.com/chapteremail** and follow the directions.

Questions:
Call 800/428-2244 or 312/280-0170.

(AAII Member Privacy: Your email address will not be shared with any other company or service.)

The opinions of speakers are their own and not necessarily those of AAI. It is not the policy of AAI 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. There are no representations

or warranties of any kind, expressed or implied, about the completeness, accuracy, reliability, or suitability of meeting information. Investment information presented may not be appropriate for all investors and should be independently verified.

REGISTER BY MAIL

ADVANCE REGISTRATION FOR
Saturday, October 10, 2015

Name: _____

Email: _____

Phone: (____) _____

Family/Guest Name(s): _____

____ # Members & Family: \$ _____

____ # Nonmembers: \$ _____

Season Passes

____ # Members: \$ _____

____ # Nonmembers: \$ _____

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 AAll) to:

AAll Phoenix Chapter
Roger Carter, Registrar
2930 East Acoma Dr.
Phoenix, AZ 85032-5009

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

Meeting Details

Saturday,
October 10, 2015

FRANCISCAN RENEWAL CENTER

5802 E. Lincoln Dr.
Scottsdale, AZ 85253
480/948-7460

SCHEDULE

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

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

FEES

In Advance
(postmarked by 10/7)
AAll Members, Member's
Family, **\$9/person**;
Nonmembers, **\$11/**
person

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

Fees include afternoon
subgroups.

REFUND POLICY

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

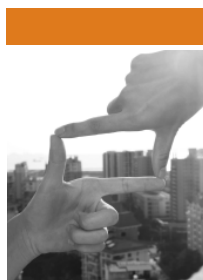
Season Passes

Season passes are
now available for the
October-April meetings.

AAll members pay **\$49**
instead of **\$63**.

Non-members pay **\$63**
instead of **\$77**.

Use the registration form
to the left to order your
season pass.



Paul Deloughery is an
asset protection, estate
planning and probate
attorney in Scottsdale.
Since 2003, he has been
helping high-net-worth
families protect their as-
sets using sophisticated
legal strategies. He has
been practicing law
since 1998.

In 2009, his father died
and Deloughery inher-
ited his father's significant
stock portfolio. Delough-
ery's father had invested
heavily in Carlos Slim's
companies (like America
Movil) early on.

The experience of
inheriting his father's
multimillion-dollar estate
has given Deloughery
real-world knowledge
about the emotions and
dynamics that happen
when the next genera-
tion inherits wealth.

He also does probate
litigation, meaning that
he works with families
who are fighting in court
after the death of a
loved one.

The AAll Phoenix Chapter Presents ...

Saturday, October 10, 2015

INTRODUCTION TO CREATING A FAMILY DYNASTY

Paul Deloughery

Senior Attorney, Magellan Law

YOU WILL LEARN

- Some of the secrets used by the
wealthy to protect themselves from
lawsuits
- Whether your will or trust is a recipe
for family conflict after you are gone
- How to be a leader of your family

Approximately 70% of inheritances are
lost by the end of the second generation,
and 90% are lost by the end of third gen-
eration. Of these transition failures, only
15% are caused by lack of estate planning
documents, taxes, lack of insurance, or
other commonly believed causes. How-
ever, a full 60% of failures are caused by
lack of communication and lack of trust in
the family and 25% of failures are caused
by unprepared heirs. This presentation will
discuss how to reverse these odds. Learn
to turn your family into an oak tree that
lives for many years, rather than a daisy
that prospers for a season and then with-
ers away.

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

Special Interest Groups Held After the Chapter Meeting, Saturday, October 10, 2015

For SIGs held after the chapter meeting, the fee is included
with the chapter meeting fee.

HEALTH CARE REFORM AND MEDICARE

Allan Zee

allanzee@argeusgroup.com

12:00-1:00 p.m. Join us for
an informative and spirited
discussion of the Affordable
Care Act. We'll discuss the year
in review, the many changes still
to come and the future of health
care.

INVESTMENT PROTECTION

Fred Artus

artusfred@gmail.com,
207-997-3657

1:00-2:00 p.m. Focuses on
wealth protection in perilous
times, imparting improved skills
and strategies to help protect
your portfolio and increase
your wealth. Complements the
fundamental work of the Stocks
& ETFs SIG and the Options &
Analysis SIG.

STOCKS AND ETFs

Eugene Almer

602-300-4573

2:15-3:15 p.m. Independent
traders and successful investors
present their methods and
strategies of trading. Charting
tools and tactics are covered,
along with investor psychology,
portfolio strategies and handling
potential losses. Works closely
with the Options & Analysis SIG.

OPTIONS & ANALYSIS

Lowell Carty

lowell39@msn.com

3:30-4:30 p.m. Participants
will benefit from a combination
of tutorial presentations and
active discussions. Participant
experience ranges from initial
learning to active traders. We
work closely with the Stocks and
ETFs SIG.

Special Interest Groups Held in Other Months

PERSONAL FINANCE AND RETIREMENT INCOME PLANNING

Dr. Joyce Morningstar

jmorningstar@dynamicwealthadvisors.com

**Meets after the chapter meeting in November, January
and March.** Financial planning after retirement becomes more
challenging. We all want to make good decisions, but most investors
get into trouble with their emotions and habits. The SIG's focus is
educating members on how to make the best informed financial
decisions for themselves. Our group welcomes different viewpoints
and participation from both experienced and new investors.