

AAII SAN FRANCISCO CHAPTER MEETING

Saturday,
July 19, 2014

SMART INVESTING: SEEKING REWARD WHILE REDUCING Risk

discussed by:

**CHARLES ROTBLUT,
CFA**

Vice President, AAIL; Editor, *AAII
Journal*

REASONS TO ATTEND

- Learn why sticking to a long-term strategy is critical to achieving investing success
- Discover common behavioral errors and a method for keeping emotions out of your sell decisions
- See the criteria Charles personally looks for in a stock



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
AMERICAN
ASSOCIATION
OF INDIVIDUAL
INVESTORS
**625 N. MICHIGAN AVE., Suite 1900
CHICAGO, IL 60611-3151**

SUBGROUPS

East Bay Discussion and Special Interest Group

Attendance is free for all AAIL members & guests.

Dates: **Thursdays, July 10 and August 14**

Time: 7:00–8:40 P.M.

Location: The Orinda Library, 24 Orinda Way, Garden Room

Moderator: Mike Skinner

These meetings are held every month except December. The agenda varies between open forum topics suggested by attendees at the meeting, and speakers and presentations on topics suggested in advance. Attendees have different experience levels and investment approaches. This is an opportunity to discuss current investment issues, share questions and concerns in an open forum, and interact in a small group setting with presenters and other attendees.

For more information, contact Mike Skinner, group leader, at 510/526-1154 or michaelskinner984@yahoo.com.

San Francisco Downtown Experienced Investor Discussion Group

Attendance is free for all AAIL members, but space is limited to first 20 attendees.

Dates: **Wednesdays, July 16 and August 20**

Time: 12:00 p.m.

Moderator: Kevin Donovan

These meetings, held the third Wednesday of each month, are a general discussion of timely topics for experienced investors. Space is limited to 20 attendees, so please call for reservations and location. For more information contact Kevin Donovan, group leader, at 415/788-1700.

FUTURE MEETINGS

Saturday, September 20

Speaker: TBD

Topic: TBD





MEETING DETAILS

SATURDAY, JULY 19, 2014

Hs Lordships Restaurant

199 Seawall Drive,
Berkeley, CA 94710
510/843-2733
(see directions)

**Registration/Social/
Continental Breakfast,**
9:00 a.m.

Program, 9:30 a.m.

Q&A, 11:00 a.m.

Lunch is not included.

In Advance (by 7/16)

Prepaid by mail, **\$30/**
person; Email or phone
(see below) & pay at the
door (space permitting)
\$35/person

At the Door (space per-
mitting): \$40/person (by
cash or check **only**)

Refund Policy: Checks
shredded for cancella-
tions before 7/16

CHAPTER INFORMATION

Chapter Contact/Phone Reservations

Mike Skinner,
510/526-1154

Chapter Email Address/ Email Reservations

aaichapter_sanfrancisco@
yahoo.com

THE AAIL SAN FRANCISCO CHAPTER PRESENTS ...

SMART INVESTING: SEEKING REWARD WHILE REDUCING RISK

discussed by:

CHARLES ROTBLUT, CFA

Vice President, AAIL; Editor, *AAIL Journal*

Maximizing the potential for reward is about identifying attractive investments and prudently managing your portfolio. Reducing risk is about limiting behavioral errors and avoiding investments with a greater likelihood of decreasing in price. In this presentation, *AAIL Journal* editor Charles Rotblut will describe actionable strategies for striking a prosperous balance between reward and risk.

ATTEND THIS MEETING AND LEARN:

- **A simple strategy for reducing behavioral errors and improving your investment decisions**
- **How to maintain the benefits of diversification and reduce portfolio risk**
- **Key criteria to consider for managing your portfolio**

ABOUT CHARLES ROTBLUT, CFA

Charles Rotblut is a vice president at AAIL. He is the editor of the *AAIL Journal*, co-created *AAIL Dividend Investing*, helps to manage the Stock Superstars Report portfolio and authors the weekly AAIL Investor Update email. Rotblut is a Wall Street Journal expert panelist and a regular guest on MoneyLife with Chuck Jaffe. His book, "Better Good than Lucky: How Savvy Investors Create Fortune with the Risk-Reward Ratio," was published in November 2010. Rotblut holds the Chartered Financial Analyst designation and has analyzed both publicly traded and privately held companies. He has worked for Zacks Investment Research, an investment research firm; INVESTools, an investment education company; Curian Capital, a money management firm; and McClure, Schumacher & Associates, a business valuation firm. Rotblut regularly speaks to the media, including The Wall Street Journal Radio Network, Canada's Business News Network, and Reuters. He has also appeared on CNBC, Bloomberg Television, and Fox Business.

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. 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.

DIRECTIONS

From Hwy. 80 N. or S.—Take University Avenue exit. Follow signs to Berkeley Marina and proceed west on University Avenue 1.5 miles to its end, near the Berkeley Pier. Turn left onto Seawall Drive and proceed 0.1 mile; Hs Lordships' parking lot is on the left. <http://maps.yahoo.com>



AAIL SAN FRANCISCO CHAPTER

**Advance Registration Form for
Saturday, July 19, 2014**

REGISTRANTS/TOTAL FEES

___ Everyone \$ ___

Total Fees \$ ___



Mail completed advance
registration form with your
check (payable to AAIL) to:
**AAIL San Francisco
Chapter c/o Buzz
Vanderschoot
P.O. Box 1266
El Cerrito, CA 94530-1266**
*No confirmation will be sent;
your canceled check is your receipt.*

REGISTRANT INFORMATION (PLEASE PRINT)

Member Name _____

Email _____

Phone (_____) _____

Family/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.