



AAII WASHINGTON DC METRO CHAPTER MEETING
Saturday, February 18, 2017

Register NOW
to help us plan:
Pay Online

(Or view Registration Details below)

As a member of AAI, you are invited to the WASHINGTON DC METRO Chapter's upcoming meeting. Please share this email with your family and friends and let them know they are welcome to attend also.

FREE Member Benefit—If you are not already receiving the WASHINGTON DC METRO Chapter Meeting announcements by postal mail, simply [click here](#) and follow the instructions under the heading Signing-Up for Local Chapter(s).

The AAI WASHINGTON DC METRO Chapter will present:

“CREATING A FIXED-INCOME SAFETY NET FOR YOUR PORTFOLIO”



Discussed by:

Bob Pugh CFA, CFP

President and Founder, Insight Wealth Management, Inc.

Many investors find themselves in hot water during equity market corrections and bear markets because of their failure to manage risk appropriately. Investing should be about

managing risk first and chasing return second. Some investors are even endangering their standard of living, especially in retirement, by not creating a safety net in their investment portfolios. One of the best ways of creating a portfolio safety net is an allocation to fixed income. In this workshop, Bob Pugh will explore how to use fixed-income investments effectively as a key tool to manage portfolio risk.

YOU WILL LEARN

- How to assess your risk tolerance and determine an appropriate allocation to fixed income in your portfolio
- Alternative ways of managing risk in your portfolio, with a focus on fixed income
- How to structure the fixed income allocation in your portfolio using individual bonds and ETFs

BIO

Bob Pugh, CFA, CFP, is president and founder of Insight Wealth Management, Inc., an independent registered investment adviser in Gainesville, Virginia. He's a NAPFA-registered financial adviser and a member of the CFA Institute, the FPA, NAPFA, Mensa and the National Association for Business Economics. Pugh is a former president of the CFA Society of Washington DC and has 25+ years of experience in economics, financial education and portfolio mngt. He's taught grad-level courses at Johns Hopkins University's Carey School of Business, and teaches Level III CFA exam review. Pugh has grad degrees in global political economy from Johns Hopkins and in financial economics from UNC-Greensboro.

» [More Information](#)

MEETING DETAILS

Date: Saturday, February 18, 2017

Time: 9:00 AM Registration/Social Time
9:00 AM Continental Breakfast Time
9:30 AM Program Time

Location: Northern Virginia Community College
Annandale Campus
Richard J. Ernst Community Cultural Center
8333 Little River Turnpike
Annandale, Virginia 22003

See www.aaidcmetro.com Parking in the Student Parking Lot "B" is free for all registered attendees.

Payment: In Advance (online or by mail)

Postmarked by 2/14,

\$53/person;

Postmarked after 2/14,

\$58/person

At the Door

(space permitting)

Everyone, \$63/person

Pay Online » or **Registration Details »**

SUBGROUP DETAILS

Subgroup meetings do NOT require advance registration (some may request an RSVP). Most are free of charge. Contact the group leader if you need additional information to attend.

Computerized Investing Special Interest Group (CISIG)

Paul Grems Duncan

Grems8544@gmail.com

[703-509-5332](tel:703-509-5332)

For information regarding the winter schedule for CISIG, please go to www.aaidcmetro.com or contact Paul Grems Duncan.

Maryland Investment Special Interest Group (MISIG)

Sondra Katz

sondrakatz@yahoo.com

Ferd Hassler

fhassler@aol.com

MISIG meetings are at the Bethesda Library, 7400 Arlington Road, Bethesda, MD.

REGISTRATION — ADVANCE OR AT-THE-DOOR

By clicking the link below, you will be able to register in Advance or view details for At-the-Door registration.

[Pay ONLINE »](#) or [REGISTRATION DETAILS »](#)

If you have questions regarding this chapter meeting or the speaker's presentation, please send an email to aaiidcmetro@yahoo.com.

If you have questions regarding your AAI membership, please contact AAI Member Services: members@aai.com.

CHAPTER MEETINGS OFFER:

- ▶ Hands-on education
- ▶ New investment concepts and ideas
- ▶ Fellowship and a bit of fun

CHAPTER INFORMATION:

- ▶ [Chapter Email Contact](#)
- ▶ [WASHINGTON DC METRO Chapter Web Page](#)

MISSION STATEMENT:

AAII local chapters, grassroots organizations led by volunteer AAI members, allow AAI to extend its mission "person to person" to individual investors in their own communities by programming meetings that provide unbiased investment education in a social context.

Opinions that may be expressed in this meeting announcement and at chapter presentations are not necessarily those of AAI, whose only intent is to provide a background for the understanding of investment theory and practice.

This email has been sent to sarguette@aol.com. You received this meeting announcement as part of your membership with AAI.

If you do not wish to receive Meeting Announcements via email, please [unsubscribe](#) now. Note: This will cancel all future AAI Chapter Meeting Announcements via email.

To edit your email subscriptions or to manage your profile, please go to the My Account area on AAI.com. Here you can update your Local Chapter affiliation as well as your email and shipping address, and change your login information.

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Tony Hausner, Chair
Safe Silver Spring
safesilverspring.com
Chair, AAI Chapter Leaders Exec Cmte
aai.com
Program Co-chair and Past President

AAII DC Metro Chapter
aaiidcmetro.com

home: 301-587-6943
cell: 301-641-0497