Register NOW to help us plan:

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(Or view Registration Details below)

As a member of AAII, 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 AAII 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.

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

» More Information
See www.aaiidcmetro.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
For information regarding the winter schedule for CISIG, please go to www.aaiidcmetro.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.
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 AAII membership, please contact AAII Member Services: members@aaii.com.

CHAPTER MEETINGS OFFER:
- Hands-on education
- New investment concepts and ideas
- Fellowship and a bit of fun

MISSION STATEMENT:
AAII local chapters, grassroots organizations led by volunteer AAII members, allow AAII 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 AAII, whose only intent is to provide a background for the understanding of investment theory and practice.

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

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To edit your email subscriptions or to manage your profile, please go to the My Account area on AAII.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, AAII Chapter Leaders Exec Cmte
aaii.com
Program Co-chair and Past President