

Print

Date: Monday, January 2, 2017 5:34 PM
From: AAI Rochester <aaiirochester@gmail.com>
To: AAI Rochester <aaiirochester@gmail.com>
Cc: pheasantww@gmail.com, sudorenaic@gmail.com
Subject: January 25, 2017 - Rochester AAI Financial Planning SIG - MEETING AGENDA

Agenda: Wednesday, January 25 - AAI Financial Planning SIG

Our next AAI Rochester Chapter Financial Planning SIG meeting will be held on Wednesday January 25, at the Penfield Public Library's Ruth Braman Conference Room, 7-9PM. The Library is located at 1985 Baird Rd., Penfield 14526.

1. January 25 Program

"Investing at Level 3 - Higher Returns with Minimal Risks for the Long-Term Individual Investors," a new book by James Cloonan, AAI Co-founder. This book discussion will be led by two lifetime Rochester AAI members, Phil Cianciotto and Len Lyons. Phil has prepared a set of cliff notes to review at the outset of the meeting and together with Len Lyons, they would like your ideas on these notes. Please come prepared to share your insights on this new book.

Note: The Austin, Texas Chapter President recently held a similar book discussion for his members at its monthly meeting. He offered to share his slides. I will bring his slides if I get them before our meeting.

2. February 15 Program

"Financial Health" by Jim Terwilliger, PhD, CFP, Senior Vice President, Financial Planning Officer, Wealth Strategies Group, Canandaigua National Bank and Trust Company. At this meeting, Jim will cover tax law changes Congress made in December 2016, changes in income-related tax/fee thresholds in the Federal income tax, and any tax-related changes of interest; Qualified Charitable Distributions from IRAs (refer to his article from 55 Plus magazine, September/October 2016 issue); and how to set up memorial funds,

3. March 2017 Program - Date TBD.

"A Case for Dividend Stocks" by Jeff Fraser, Rochester AAI Chapter Breakfast Club Chair.

Contact Diep Chu at di5215@aol.com if you wish to reply to this email.

Diep Chu
Rochester AAI Chapter Financial Planning SIG, Chair

--

IMPORTANT

If your mail is returned to us as undeliverable, then you will be removed from our distribution list. Mail is frequently returned when mailboxes are full.

If you wish to stop receiving mail from AAI Rochester, then simply reply to this note and put UNSUBSCRIBE in the subject box.
