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 Subject: September 26, 2017 - Rochester AAll Financial Planning SIG MEETING AGENDA

Tuesday, September 26 - AAll Financial Planning SIG

Our next AAll Rochester Chapter Financial Planning SIG meeting will be held on Tuesday, September 26, at the Penfield Public Library's Ruth Braman Conference Room, 7-9PM. The Library is located at 1985 Baird Rd., Penfield 14526.

1. September 26 Program

"Options - Using Credit Spreads," a high probability trading process for regular income presented by Jim Blaser, lifetime Rochester AAll member. Jim's bio follows:

Jim Blaser, BS, MBA

We (Janet and I) have lived in Fairport since 1973. I retired from Xerox in 2001.

Spent my career in Finance, Purchasing and Manufacturing Operations. Serious investing the last 20 years.

Janet was board member for NAIC and is still active with many of those past members.

We have three children, seven grandchildren. Life is good.

Jim's presentation outline:

Options

Using Credit Spreads

A High Probability Trading Process for Regular Income.

Using VectorVest Products
Not a **BIG BANG** process

Definition Review

Calls, Puts---Buyers and Sellers
Strike Price, Expiration

Advantages—High probability Trades, No decay, Rigid Rule Based Process

Concept Born out of:

Buyer & Seller—Expiration, Strike, and Premium to reduce risk, take small profits frequently.

What does a spread look like?

How to Find, Set-up and Manage

The SPX Trade

2. October 30 Program

"Choices for Medicare Coverage" by Jane Ahrens. This is Jane's fourth annual presentation to the Rochester AAll

Financial Planning Group. Bring all your Medicare questions and they will get answered!

3. November Program - Date TBD

"General, Open Discussion of Tax Planning."

Diep Chu, Rochester AAll Financial Planning SIG, Chair

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

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