AAII Financial Planning SIG - PROGRAM PLAN

#	Presenter	Ten Things Every Investor Should Know	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
1	Rowland Billy	The Major and some Minor Global Stock & Bond Indices	10/26/10					
2	Henry Wirth	Stocks, Stock Selection and Stock Screens: The Pros and Cons	01/19/11					
3	Ed Arditi	Bonds, Bond Funds & Fixed Income Investing	02/23/11					
4	Henry Wirth	Mutual Stock Funds and ETFs	03/30/11					
5	Rowland Billy	MATH: Simple Interest, Compound Interest, Geometric Return vs. Average Return, Standard Deviation, Bond Duration, Risk Adjusted Return, Return Rates when monies are added and/or subtracted during the period under consideration. Time value of money.	04/27/11					
6	Tom Campbell	Market Timing and Economic Indicators	05/24/11					
7	Roundtable/Tom Campbell	Individual Update; Need to focus on 1-2 key pts or What I did with my investments this summer?		09/28/11				
8	Henry Wirth	Index Allocation		10/26/11				
9	Tax Planning	Jeff Streiter		11/16/11				
10	Dennis Waldron	How to Find A Financial Advisor			01/24/12			
11	Diep Chu/Viren Gupta/Mary Lynn Vickers	Options Trading 101			02/15/12			
12	Phil Cianciotto	Retirement Planning			03/28/12			
13	Kevin Murray	Closed End Funds			04/25/12			
14	Dennis Waldron	What Constitutes a Great Financial Plan?			05/29/12			
15	Dan Cromie	Futures Trading			09/19/12			
16	Roundtable Discussion	Economic Lessons from the Market			10/23/12			
17	Jeff Streiter	Tax Planning			11/19/12			
18	No Meeting	No Meeting			Dec			
19	Ginny Norris	Commercial Real Estate Investment				1/23/13		
20	John Howe	Asset Allocation and Balancing				2/19/13		
21	Cianciotto/Fraser/Yurick	Panel Discussion - Investing Experiences				3/27/13		
22	Lisa Powers	Trusts, Estates, and Elderlaw				4/24/13		
23	Henry Wirth	Return on Investment Calculations				5/21/13		
24	Ethan Welch	Stop Investing, Start Trading				9/17/13		
25	Dennis Waldron	A Great Financial Plan '00-'07 vs '08-now				10/31/13		
26	Jeff Streiter	Tax Planning				11/19/13		
27	NO MEETING	NO MEETING				Dec		
28	Jane Ahrens	Medicare 101				1/14/14		
29	Ed Arditi	Fixed Income Investing				2/19/14		
30	Dennis Waldron	Roundtable Discussion				3/26/14		
31	Ginny Blackwell	Real Estate Investing - Here and Abroad				04/23/14		
32	Susan Suben	Latest trends in LTC Insurance and Industry Findings				05/27/14		
33	Dan Penberthy	Rand Capital Corporation				09/17/14		
34	Jim Terwilliger	Income-Related Tax/Fee Thresholds in Fed Inc Tax				10/22/14		
35	Jeff Streiter	Tax Planning				11/19/14		
36	NO MEETING	NO MEETING				Dec		
37	Dennis Waldron	Roundtable discussion					01/21/15	

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38	Mark Armbruster	Break Free from the Traps of the Investment World					02/25/15	
39	Bill Monte	Effective Wealth Transfer and LTC Planning					03/25/15	
40	Jeff Veneziano	Behavioral Finance					04/22/15	
41	Group Roundtable	Group Roundtable					05/27/15	
42	Phil Cianciotto	What is a diversified equity and fixed income portfolio					09/29/15	
43	Jane Ahrens	Medicare coverage choices					10/27/15	
44	Jeff Streiter	Tax Planning					11/10/15	
45	NO MEETING	NO MEETING					Dec	
46	Ed Cain	Avoiding Investment Scams						01/12/16
47	Jim Tishcher	ETF Investing - An Ind. Investor's View						02/03/16
48	Bill Monte	Wealth Transfer for non-spouse Beneficiaries						03/23/16