

Morningstar's Best Ideas for 2017 and beyond

[View this email in your browser](#)

**Join the AAI –PORTLAND CHAPTER on  
SATURDAY, September 10th 9am-12 noon**

[Register on-line now](#)

*Hear about where Morningstar's analysts are finding opportunities today and how  
that translates into specific stock, mutual fund, and ETF picks.*

*Christine will talk about age-appropriate stock/bond/cash mixes for investors at  
various life stages—so invite your family to come along and learn.*

**“Morningstar’s Best Ideas for 2017 and Beyond”**

**Christine Benz**

***Director of Personal Finance***

***Morningstar***

**Morningstar's Director of Personal Finance Christine Benz will share Morningstar's outlook for various parts of the stock market based on the firm's equity analysts' bottom-up research. She'll also discuss the analysts' best ideas across a swath of investment vehicles: individual stocks, mutual funds and exchange-traded funds. Finally, she'll present model retirement portfolios consisting of the firm's top-rated mutual funds and exchange-traded funds.**

***Attend This Meeting and Learn...***

- Morningstar's philosophy for evaluating stocks, mutual funds, and exchange-traded funds

- Strategies for creating sensible, hands-off portfolios for both accumulators and retirees
- Morningstar's current assessment of the equity market, based on its bottom-up research



**Christine Benz is director of personal finance for Morningstar and senior columnist for Morningstar.com. She is author of 30-Minute Money Solutions: A Step-by-Step Guide to Managing Your Finances (Wiley, 2010).**

**Christine Benz is also co-author of Morningstar® Guide to Mutual Funds: 5-Star Strategies for Success, a national bestseller published in 2003, and author of the book's second edition, which was published in 2005. Before assuming her current role in 2008, Benz also served as Morningstar's director of mutual fund analysis.**

---

#### **SATURDAY, SEPTEMBER 10th MEETING DETAILS**

**Details:** Welcome, a few minutes of Chapter business, and then Christine Benz' presentation starts, followed by Q & A. There will be a refreshment break with coffee, tea and cookies about 10:15 am. We adjourn at 12 noon.

**LOCATION:** East Portland Community Center, 740 SE 106th Ave, Portland, OR 97216

**Directions:** From I-205 take Stark Street exit #20. Drive east on SE Washington, turn right onto SE 106th Ave. The community center is just ahead on the left side of street.

**REGISTRATION & COST:**

\*\$20 at the door, beginning at 8:40AM (NO CREDIT CARDS ACCEPTED AT DOOR)

\*\$15 in advance **by 9/8 by 5 pm** with a credit card at: <http://aaiportland.eventbrite.com/>

\*\$15 in advance by sending a check postmarked **by 9/7** to:

AAll Portland; AAll Portland Chapter,

PO Box 66034,

Vancouver, WA 98666

**\$FREE** full time student and under 18 is **FREE**, with student ID.

**NOTE:** *Meetings are **open** to AAll members and non-members.*

**DVD of the SESSION:**

1. Order by adding \$10 to your registration fee.
  2. If you did not register to attend the event, you can order a DVD by mailing a check for \$20 to AAll Portland; AAll Portland Chapter, PO Box 66034, Vancouver, WA 98666
- 

**SAVE THE DATE**

*Here 's the next AAll Portland Chapter's meeting. You won't want to miss this double header—so mark your calendar now!*

**NOTE:** *Meetings are open to AAll members and non-members.*

**SATURDAY, November 12, 2016**

1. **Lori Schock, Director Office of Investor Education and Advocacy, US Securities and Exchange Commission. “Overview of the work of the SEC and current rulemakings impacting retail investors.”**
2. **John Bajkowski, President of AAll . “AAll Shadow Stock Portfolio: From Theory to Practical Application” .**