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**Join AAI - Portland Chapter on
SATURDAY, Jan. 13, 2018 9am-12pm**

[Register on-line now](#)



Keep Investments Shamelessly Simple



Terry Atzen is an author, teacher and investment coach from northwest Montana who has a fascinating presentation. You can learn more about Terry at www.theinvestmentcompass.com

8:40 AM – Registration

9:00 AM – Chapter Meeting with Elections

There will be a brief business meeting for election of open board positions. Candidates are Patrick Hager for Treasurer and Robert (Bob) Miller for Secretary. Nominations will also be taken from the floor. The Board will report on progress on our priorities from the 2016 Chapter Survey.

Presentation 1: KEEP INVESTMENTS SHAMELESSLY SIMPLE

Mr. Atzen will address all the “noise” that we investors are inundated with every day and how to deal with all of it in a simple manner. He will discuss the ingredients of the perfect investment while reviewing investment vehicles and, in detail, his favorite monitoring tool. In this presentation, we will learn how he develops a model portfolio. He will describe a unique investment strategy and

will also show examples of that strategy, its risks and performance. Mr. Atzen will also be giving away a copy of his new book, *Keep Investments Shamelessly Simple* to a lucky attendee.

Attend this meeting to learn:

- A refreshing approach to the investment process
- Simplicity, logic and ease of learning are the cornerstones of this approach
- A unique strategy Mr. Atzen refers to as the “teeter-totter” strategy

About Terry Atzen:

Terry Atzen is an author, teacher and Investment Coach from northwest Montana. He has been an investor for over 60 years. He simply shares his playbook, writes monthly updates as to what he is doing in the marketplace in his own account purely for the enjoyment of himself and his students. He is not licensed to buy or sell investments of any kind and does not make investment recommendations. In his spare time, he writes children’s books, golfs and never turns down an opportunity to do his favorite – fly fishing. With over 50 years as an investment professional, you can look forward to having all of your questions answered. Learn more about him at his [website](#).

Presentation 2: NEW TAX REFORM LAW UPDATE:

The Tax Cuts and Reform Act is now law. This is the most significant tax reform act in over thirty years. We have invited a seasoned CPA to discuss the highlights of this significant tax legislation. Learn about the following;

- New income tax rates
- Updated deductions and exemptions
- Corporate vs. individual tax impact
- Proactive individual tax strategies for 2018 and beyond

About Ryan Genor, CPA:

Ryan graduated from Oregon State University in 1998 with a B.S. in Business Administration with an emphasis in accounting. He is an owner in Schultz & Crouse, P.C. since 2008. His tax practice specializes in providing income tax planning and consulting services for individuals and closely held businesses.

In addition to his work, Ryan is a past member of the Northwest Federal Tax Conference project committee for the Oregon Society of CPAs and is a member of the personal financial planning division of the American Institute of

CPAs.

12:00 PM – Session end

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 1/11/18, 5 pm with a credit card at: [Eventbrite](#)

\$15 in advance by sending a check postmarked by 1/11/18 to:

AAll Portland Chapter,

PO Box 66034,

Vancouver, WA 98666

Full time student and under 18 is FREE, with student ID. A certificate of attendance is available.

Refund Policy: No Refunds

SAVE THESE DATES (upcoming chapter meetings):

~ Saturday, March 10, 2018 ~

"ETF Selection For Core And Tactical Portfolios"

by Neil Leeson, ETF Strategist, Ned Davis Research Group

~ Saturday, May 19, 2018 ~

~ Saturday, July 14, 2018 ~

~ Saturday, September 8, 2018 ~

~ Saturday, November 10, 2018 ~

Chapter Message

We are looking for volunteers for several positions. The most critical positions we need filled are: Registrar and Publicity Chair. Please contact Kathy or any of the Board members.

AAll is an independent, non-profit, volunteer-led organization. Please feel free

to contact our Board for more information about AAll, volunteering and future Portland Chapter meetings. Email us at aaichapter_portland@yahoo.com. We are a great team and would love to have you join us!

PDX Income Investor's Sub-Group.

Contact: Andy Prophet, Group Chairperson, aprophet@apresearch.com , to get on the mailing list for up-coming meetings.

The upcoming meeting will be on: **Sunday, Feb. 4, 2018**, 1:30 to 3:30 PM.
Future meeting is: **Mar 4**.

Location: Cedar Mill Community Library, 12505 NW Cornell Road, Portland OR 97229 in the Lewis and Clark room.

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