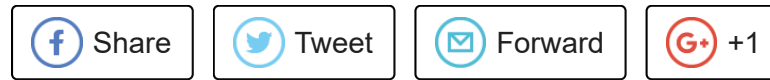


[View this email in your browser](#)

**Join AAIL - Portland Chapter on
SATURDAY, May 19, 2018 9am-12pm**

[Register on-line now](#)



Paul Merriman on Portfolio Management



Paul Merriman is a generous speaker who doesn't keep his good ideas to himself. We're happy to have him back!

8:40 AM – Registration

9:00 AM – **Portfolio Management**

Paul Merriman, Founder, Merriman Investment Service

Investing has never been simpler. Target date funds, index funds and robo-investing take most of the guesswork out of the investment process. As simple as investing has become, there are still a handful of decisions that can mean millions of dollars of additional money to be spent or left to heirs. In this presentation Paul Merriman will address his top 10 investment decisions. The presentation will focus on equity asset class selection, how to combine equity asset classes for best unit of return per unit of risk, mutual fund and exchange-traded fund (ETF) selection, finding the right balance of equity/fixed income, maximizing retirement distributions and helping family members get started in investing.

Attend this meeting to learn:

- Which equity asset classes you should own and how much in each
- How much you should have in stocks and bonds and how that should change over time
- Over a dozen strategies you can “safely” use to maximize distributions in retirement

About Paul Merriman:

Paul Merriman is a nationally recognized expert on personal finance, mutual funds, index investing, buy-and-hold investment strategies and asset allocation. He is the founder of Merriman Inc., an investment advisory firm managing over \$1.6 billion. Now retired, Merriman is dedicated to educating investors. He is the author of seven books, including “Financial Fitness Forever” (McGraw-Hill, 2011) and “Live It Up without Outliving Your Money” (Wiley, 2008). He is a regular columnist in the Retirementors section of Marketwatch.com and produces a weekly podcast at paulmerriman.com. His website has articles on asset class selection, asset allocation, mutual fund selection and recommended mutual fund and ETF portfolios for Vanguard, Fidelity, Schwab and TD

to investors

10:30 AM - Break

10:40 AM - Program continues

12:00 PM – 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 5/17/18, 5 pm with a credit card at: [Eventbrite](#)

\$15 in advance by sending a check postmarked by 5/16/18 to:

AAll Portland Chapter,
PO Box 822751,
Vancouver, WA 98682

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, July 14, 2018 ~

"Understanding the Mysteries of Market Breath", by Tom McClellan
"Investing In REITS", by Chris Barry

~ Saturday, Sept. 15, 2018 ~

"Investing From Start to Finish"
Day-long Education Event

Craig Israelsen, Ph.D ; Brian J Adams, Ph.D and more...

Chapter Message

We are pleased to welcome back Paul Merriman! His passion and commitment for educating investors is immediately evident. He always encourages investors of all knowledge levels to attend--so come, bring a friend or family member and learn how to "make more money with less risk and more peace of mind."

Want to learn more about Paul and his materials, podcasts, etc.? Check out <https://paulmerriman.com/>

PDX Income Investor's Sub-Group.

Contact: Andy Prophet, Group Chairperson, andyprophet9@gmail.com , to get on the mailing list for up-coming meetings.

Meetings are usually the first **Sunday** of the month, 1:30 to 3:30 PM. Future meetings are June 3, July 8, Aug. 12, Sep 9, and Oct. 17, 2018.

For more info, check: <https://aaiipdx.com/income-sig/>