PUGET SOUND CHAPTER, AAII

Planning and Online Resource Overview

Wednesday, January 24, 2024

7 pm Pacific Time

Agenda

- Introductions
- Puget Sound Chapter board member changes
- Puget Sound Chapter overview
- Our chapter – finances
- Our chapter - Eastside SIG
- Puget Sound Chapter website
- AAII website overview
- AAII Community
- **Our Chapter – What interests you? What speakers do you like? What are your thoughts about in person events versus online**

Goal is to go through top items in the first 20-30 minutes and spend the rest of the meting discussing our chapter interests

Puget Sound Board Members

Puget Sound Board Members in alphabetical order and current roles:

- John Anderson, webmaster
- Mary Chandler, vice president, Eastside SIG leader
- Chandru Chandrasekaran, Deputy Chair, Program Committee
- Doug Chin, past president, Program Committee
- Dana Dodge, Secretary
- Dan Mo, Chair, Membership Committee
- Suzette Moskwa, current president
- Thomas Noyes, Deputy Chair, Membership Committee
- Odette Schindler, Membership Committee
- Pete Sheill, SIG leader (on leave)
- Drew Thoresen, treasurer
- Karen Yim, Membership Committee, assists with online meetings

Puget Sound Chapter Overview

- The Puget Sound Chapter was restarted around 15 years ago
- The chapter continued through the Covid years having online meetings versus in-person meetings.
- Meeting attendance varies for both in-person meetings and online meetings.
- The membership tends to be older individuals, many of whom are retired
- Our Puget Sound board has remained relatively stable over the past 8-10 years.
- We have 3006 members (as of 1/14/2024) on the “Chicago AAII Puget Sound Chapter Community email” list. These are people who subscribe to our chapter. They may or may not live in our area
- We have 662 contacts, 538 subscribers (as of 1/14/2024) to our Mailchimp “Puget Sound Money News” email list. These individuals may or may not be AAII Members.

Puget Sound Chapter Overview

Meeting Attendance for Puget Sound Chapter – Summary View

Year	High	Low	Mean	Median
2023	34	14	22	19
2022	43	11	28	29
2021	58	24	40	38
2020	67	16	48	55
2019	72	25	52	56
2018	130	49	78	70

Meeting Attendance Overview Last 11 Meetings (1 in person, 10 online)

Date	Speaker	Topic	Attendees
Nov 4, 2023	James Park	History of Securities Fraud	14
Sept 20, 2023	Greg Geisler	Tax Efficient Decumulation	34
July 22, 2023	Brian Livingston	Holy Grail of Investing	33
May 6, 2023	Shauna Wekherlien	10 Ways to Save $10K	14
March 18, 2023	Christine Benz	5 Must-Knows for Retirement	23
January 18, 2023	Tom Manganello	SEC Update	15
Sept 21, 2022	Mariana Fariña	Closed End Funds	11
May 18, 2022	Michael Belotz	Uncorrelated Alternative Inv	17
March 22, 2022	Elisabeth Kashner	Investing as Long Game	43
January 26, 2022	John Simms	High Valuations and Future Returns	41
November 4, 2021	Craig Israelsen	Retirement Portfolio Analysis	58

Meeting Attendance Pre Pandemic

Date	Speaker	Topic	Attendees
May 18, 2019	Marilyn Cohen	Internet of Things	54
March 9, 2019	Tadas Viskanta	Never Better Time for Individual Inv	57
January 19, 2019	Gary Antonacci	Snake Oil and Factor Based Inv	72
November 17, 2018	Brian Livingston	Muscular Portfolios	130
September 16, 2018	Bruce Johnstone	The Economy and Markets	100
July 21, 2018	Raymond Rondeau	Value Investing at Minimal Risk	49
May 19, 2018	Wesley Gray	Momentum Investing	69
Sept 14, 2014	Paul Merriman	highest attendance in person	180
May 16, 2015	Nick Kaiser	lowest attendance in person	36

Puget Sound Chapter Finances

- The headquarters in Chicago manages chapter funds.
- Our bank balance with Chicago at the end of December 2023 was @ $9500
- Our sole revenue comes from meeting attendees
- We have our own website, which we pay for out of chapter funds – chapter board members maintain that website as volunteers
- Even pre-covid, as shown to the right our in-person meetings at 6 a year are not financially viable. We lost $4300 in 2019.

AMERICAN ASSOCIATION OF INDIVIDUAL INVESTORS CHAPTER INCOME EXPENSE STATEMENT PUGET SOUND CHAPTER		
	POST COVID YTD 12/31/2023	PRE-COVID YTD 12/31/2019
PROGRAM REVENUE:		
CHAPTER MEETING RECEIPTS	$ 1,593.18	$ 5,959.54
PROGRAM EXPENSE:		
CHAPTER POSTAGE	$ 248.00	$ 77.00
CHAPTER WEBSITE	170.43	150.87
FACILITY EXPENSE	324.00	4,523.00
SPEAKER FEE	1,000.00	2,000.00
SPEAKER TRAVEL		1,365.90
PROGRAM MATERIALS		218.34
COPIES		470.31
CHAPTER BOARD EXPENSE	27.85	395.23
CHAPTER MTG FOOD & BEV		41.69
EVENTBRITE/PAYPAL FEES	59.34	272.50
TRMPORARY HELP		750.00
TOTAL PROGRAM EXPENSE	1,829.62	10,264.84
NET INCOME /(LOSS)	$ (236.44)	$ (4,305.30)
CHAPTER BANK ACCOUNT BALANCE	$ 9,500.00	$ 3,762.00

Puget Sound Chapter Overview

Puget Sound Chapter Finances

- Revenue
  - Our revenue consists of donations from seminar attendees

We use Eventbrite.Com to collect meeting donations and they take a fee from the proceeds before sending them to Chicago in our behalf.

- Expenses
  - Our most used expense categories are:
    - Chapter postage (post office box)
    - Chapter website
    - Facility Expense (we used to have contract with MICEC and paid a yearly fee)
    - Speaker Fee
    - Speaker Travel Expense
    - Program Materials
    - Chapter Board Expense
    - Copies

Puget Sound Chapter Overview

Meeting Data

Selected Meetings Before and After Covid

Meeting Date	Total Expenses	# of Attendees	Average Expense Per Attendee	# of Donations	$ Donations	Average Donation
November 2023 (in person)	$251.85	14	$17.99	14	$198.25	$14.16
Sept 2023	$511.82	34	$15.05	34	$405.00	$11.91
December 2019	$1322.83	25	$52.91	25	$318.50	$12.74

Meeting Data Conclusions

- Our in-person attendance was declining before Covid
- Historically we have had small losses for several meetings but then one or two meetings where we have a significant profit to make up for the losses such that we usually break even for the year. That trend was not true in 2019
- We started the chapter with $300 and our funds have varied over time, reaching as much as $12,000. At the end of 2019 our fund balance was $3700.
- During covid our balance has inched back up to our current $9500.
- Some speakers do not charge an honorarium and some do. We try to get speakers who do not charge. We try to stay around $500-$750 or less per speaker.
- Some speakers have a very high fee ($5,000-$10,000 and more) and those speakers we cannot afford. Unfortunately for some topics members which to hear about, there are no affordable speakers.
- We try to get at least some local in-person speakers so we do not incur travel expenses.
- We can have a limited number of in-person meetings and still stay financially viable.

Brief Question/Answer

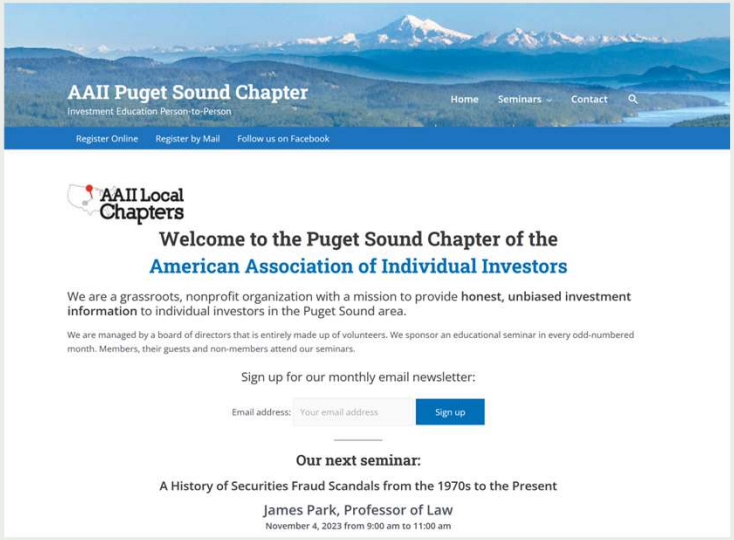
If you have questions about the information presented to this point, please write them in the Q&A or send them to president@aaiips.org

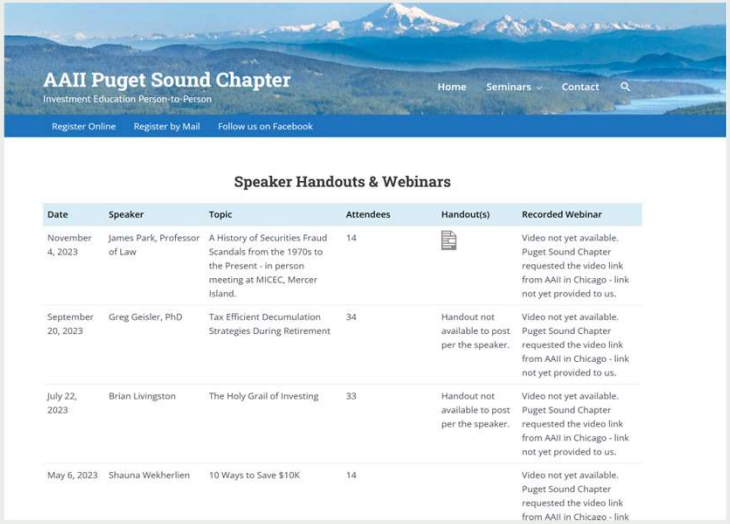
Eastside SIG – Leader is Mary Chandler

Resources Available to you as an AAII Member

The next few slides address resources available to AAII Members

We will go through them quickly; this handout is posted on the Puget Sound AAII Website: https://aaiips.org/previous-speaker-information/



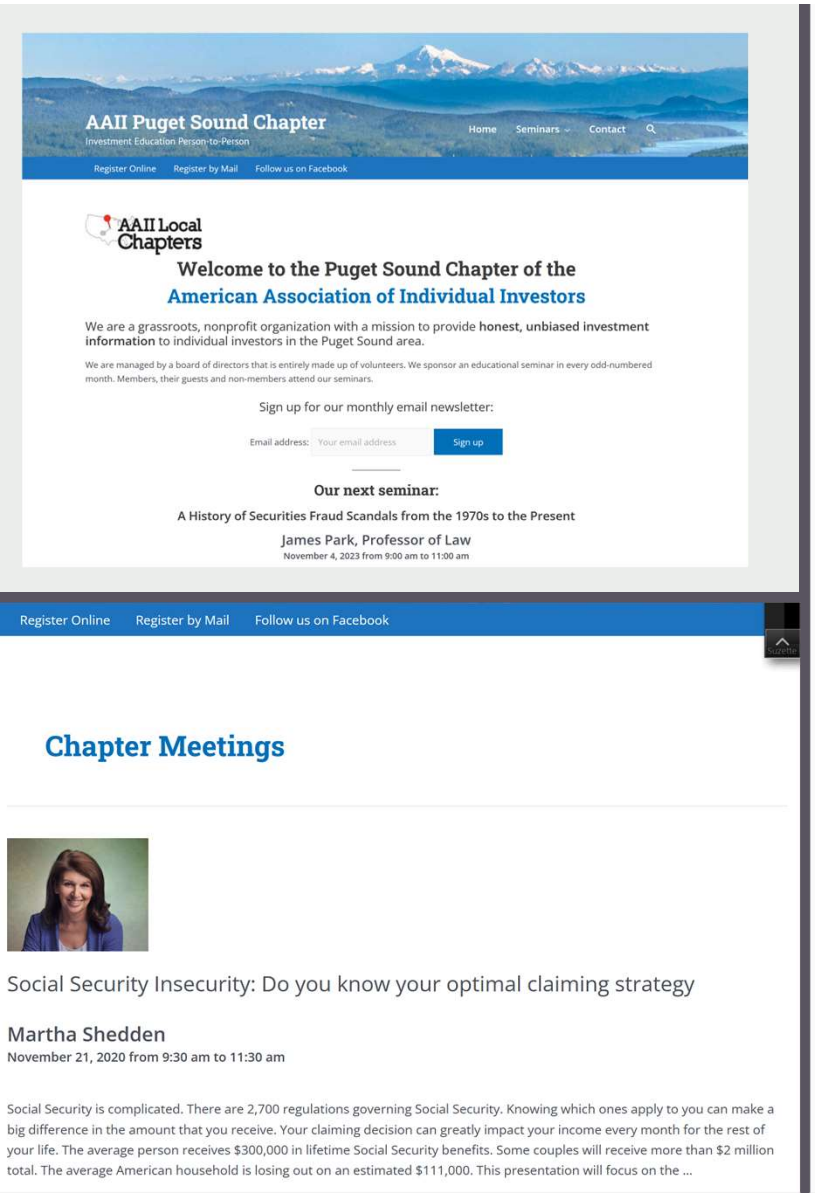


Puget Sound Chapter AAII

We have our own website at https://www.aaiips.org

We have a newsletter that comes out twice before each seminar. There is an email list we use for that. To join that email list: http://eepurl.com/gI8lan

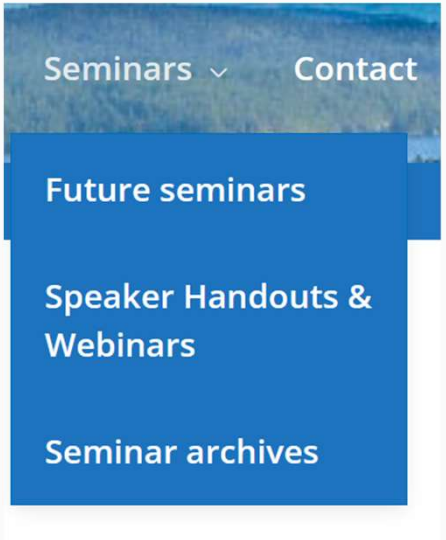
We schedule our meetings via Eventbrite.com – Eventbrite charges us fees for their services.

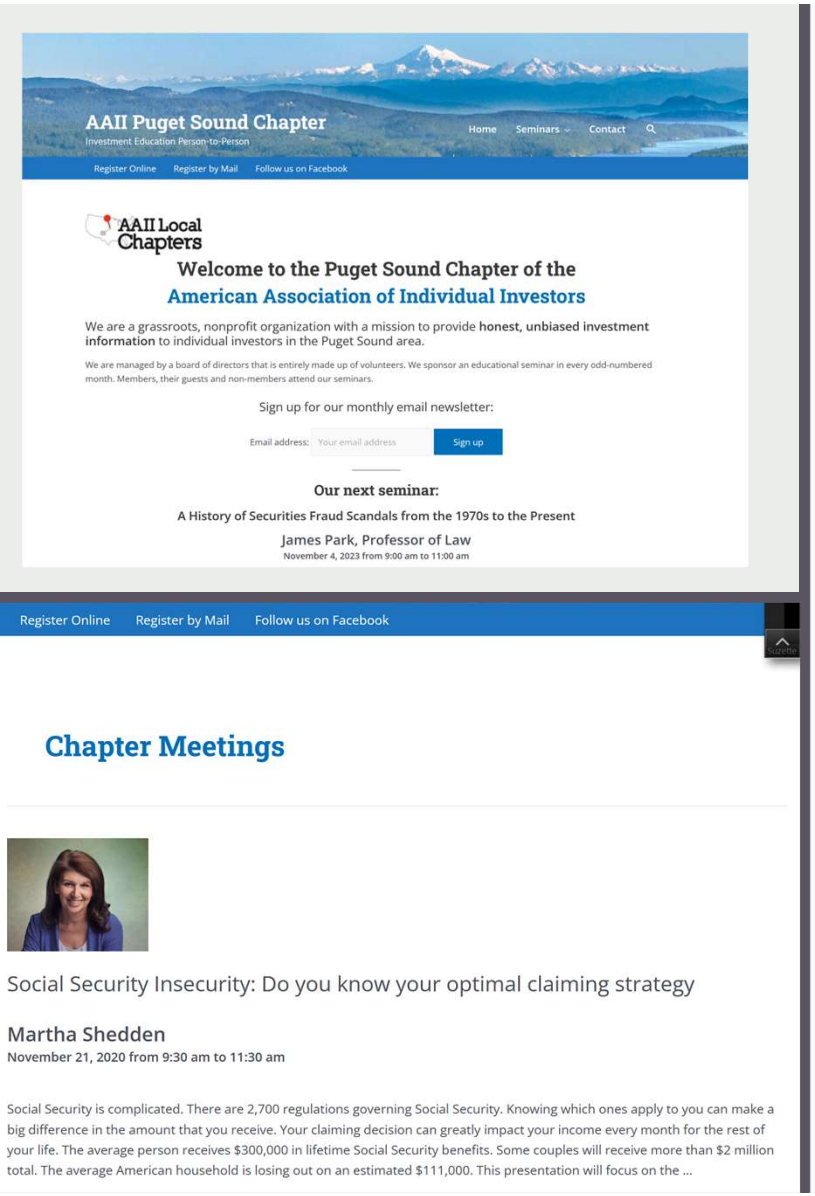


https://www.aaiips.org

We have details about our past meetings for the last few years – since the inception of our new website in late 2018.

See Seminar Archives

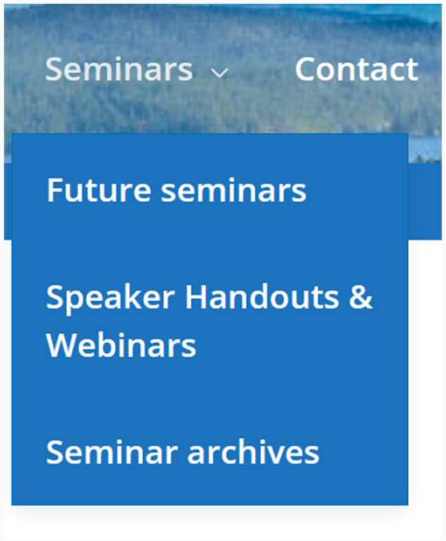


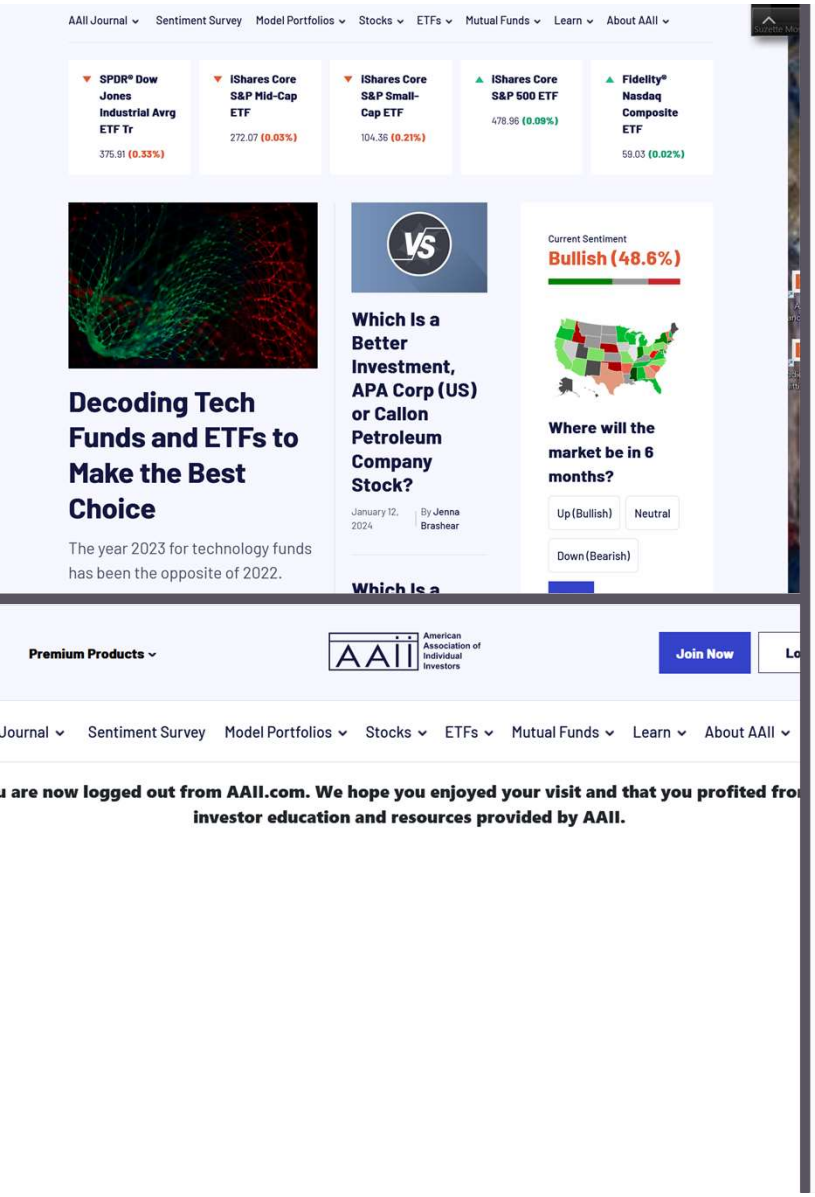


https://www.aaiips.org

We have a tabulation of speakers and topics from 2010 to the present. For some of the topics/speakers, we have handouts and video.

See Seminars, then select Speaker Handouts & Webinars





www.aaii.com

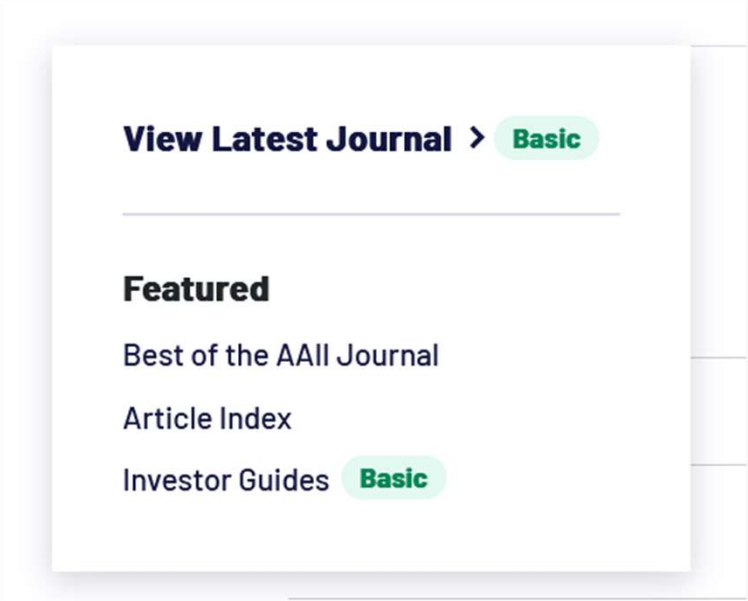
The American Association of Individual Investors main website is https://www.aaii.com

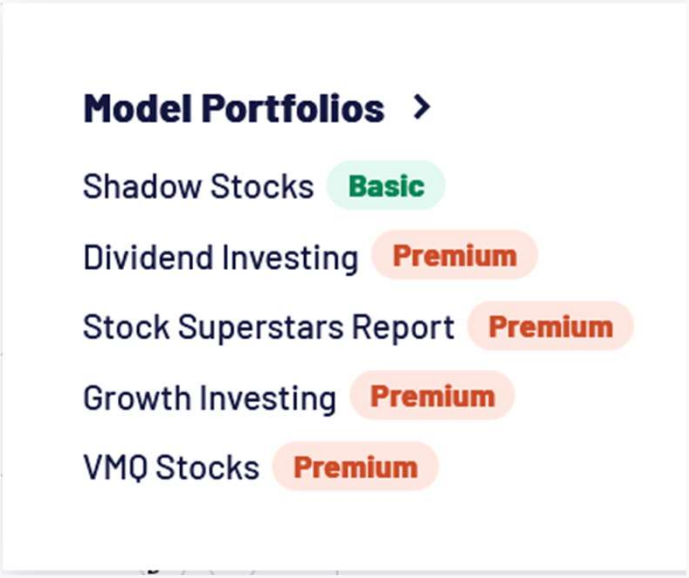
If you are a member of AAII, there is additional content available to you after you log in.

Click on <Log In> and enter our information. If you need assistance, board members are able to see basic information about all Puget Sound members. We can see:

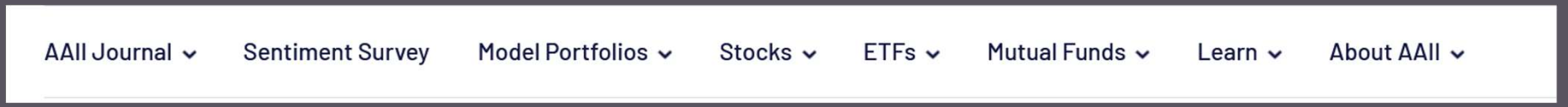
- The username you used
- The email you used
- Your role in the chapter
- The date you joined and the number of days you have been a member. Note this information is not always accurate; mine shows joined March 2022 and that is incorrect
- We can search for you by your name

Two types of content – basic and premium with premium costing you extra $$

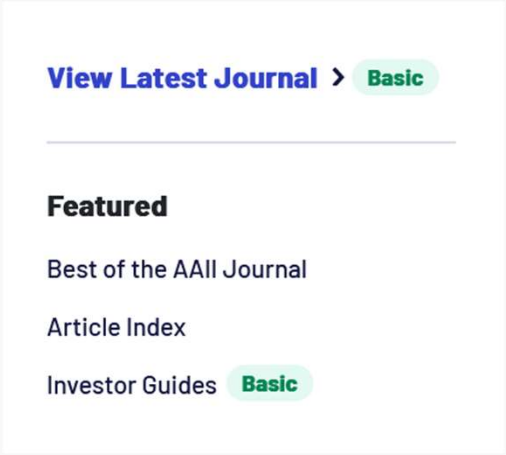




As you scroll across the main headings, you will see in each case content avilable to you as “basic” – included with your membership and content that is premium (you pay additional $ for this.



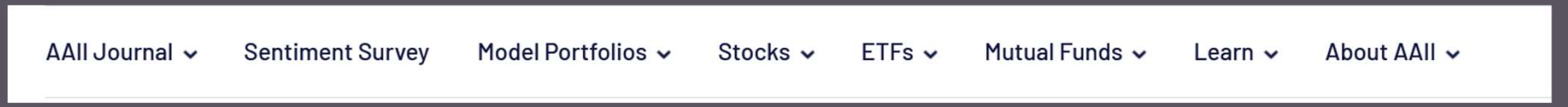
AAII Journal



You can “save” articles

- Click on article index
- Click on the year you want
- When you scroll over an article name, it changes color and you can click on that link to view the article
- Then scroll down to see the icons on the left and you can click on “save”

- Note that articles are saved in Folders (categories) that you create.



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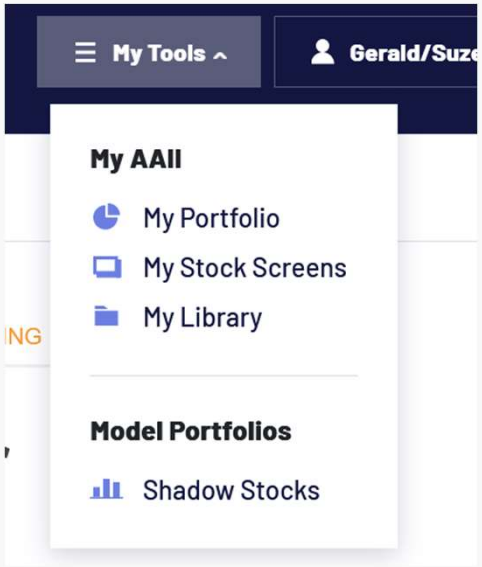
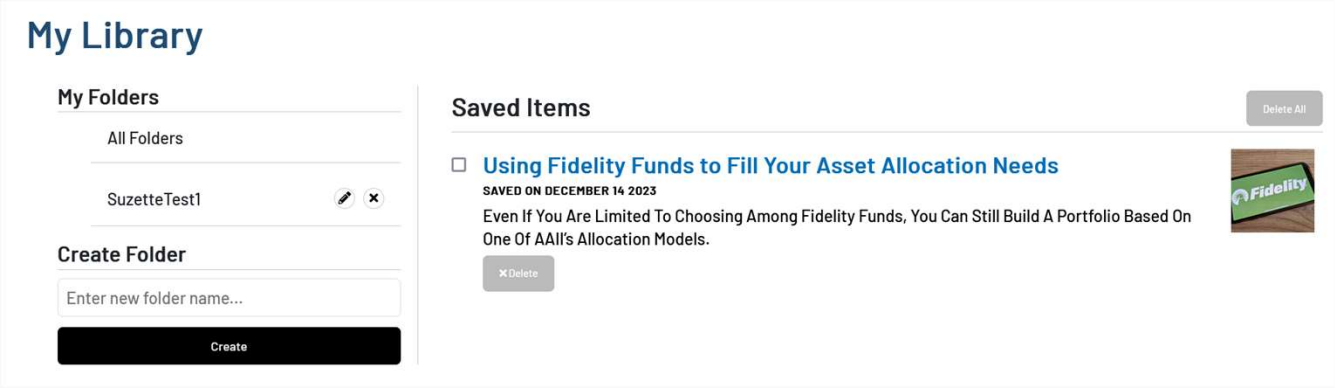


To find “saved” articles

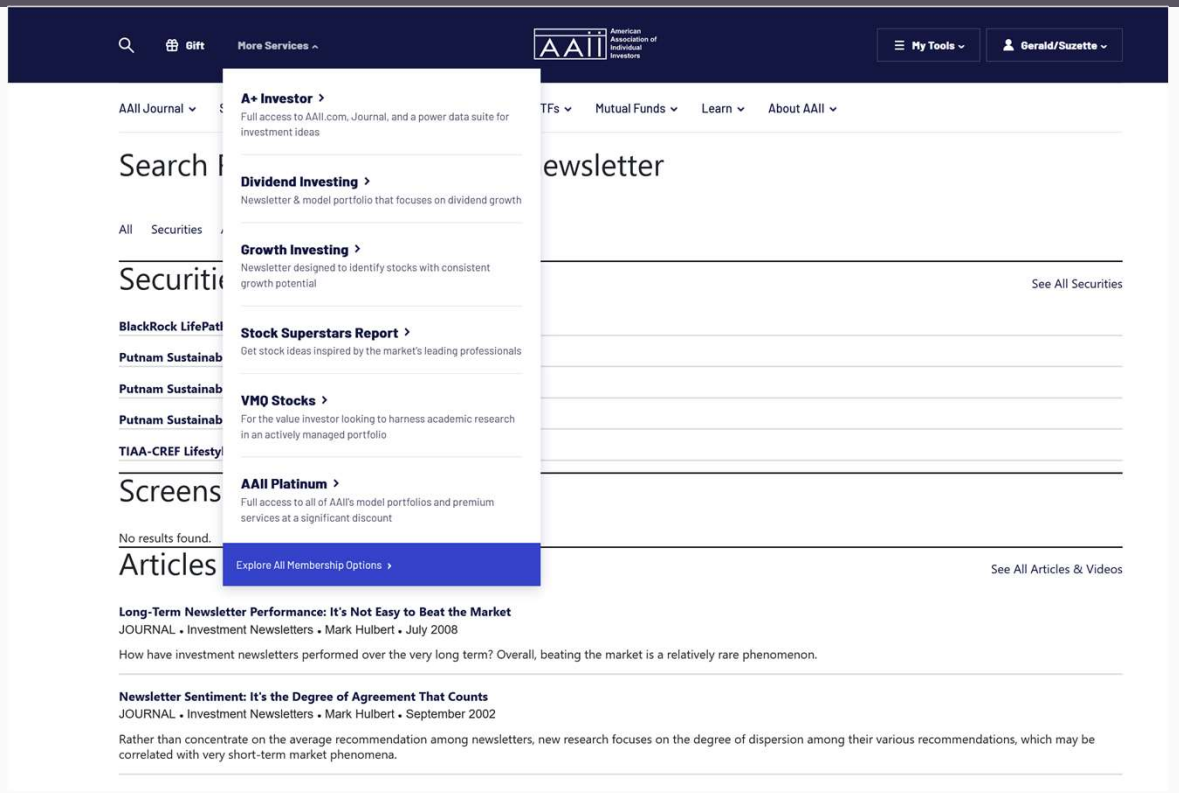
- Click on “My Tools”
- Click on “My Library”



Membership Options and Premium Services

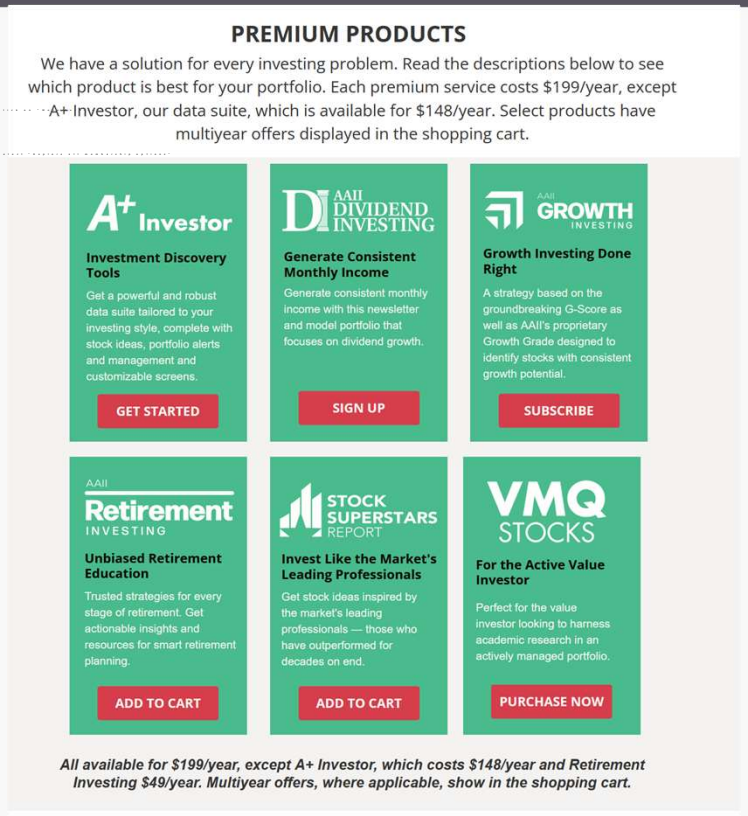
Click on “More Services”

Select “Explore all membership options”

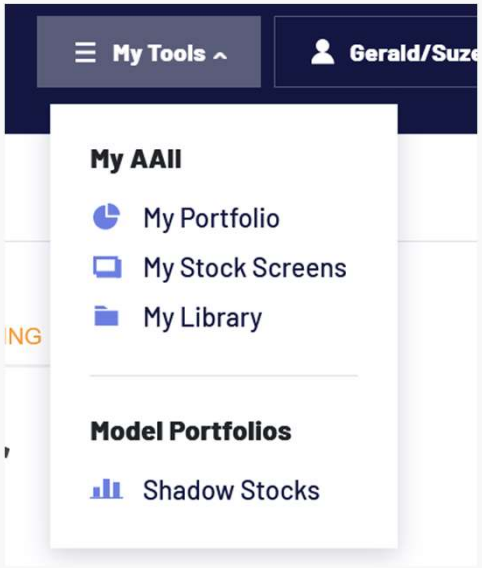


Membership Options and Premium Services

There are several added cost options. The "Retirement Investing" newsletter is particularly affordable at $49 a year.

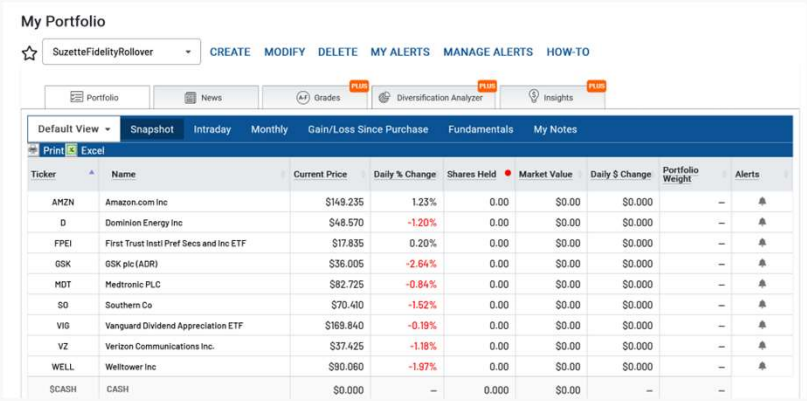


My Tools



My Portfolio

- Click on “My Tools”
- Click on “My Portfolio”
- You can create multiple portfolios – some tools require a “Plus” membership.

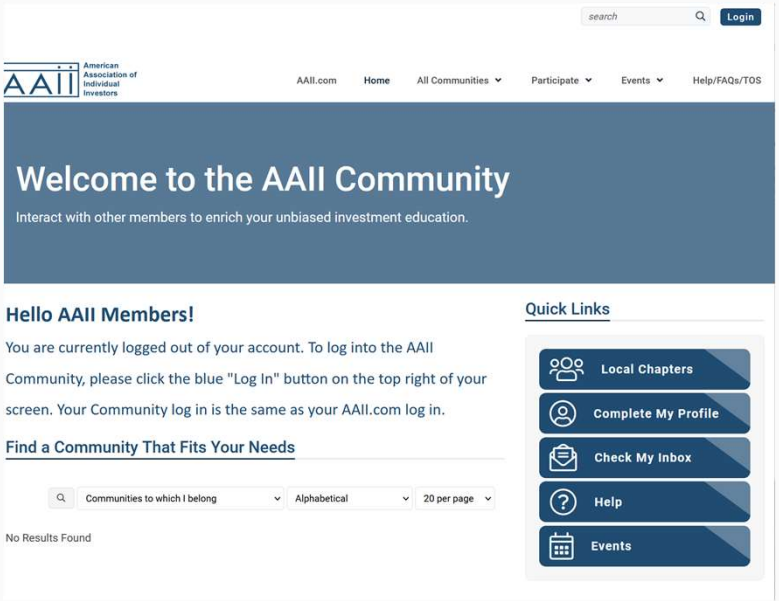


AAII Community

Logging in to AAII.com does not log you into AAII Community.

To get to Community, there are two ways:

1. Use the URL: https://community.aaii.com then log in.
2. From AAII.COM, click on About AAII, then select Community
3. For me, Puget Sound Chapter is almost never listed as a Community of which I am a member. So instead I click on my name/Community Profile, the "My Communities and then get to the Puget Sound Community from there.



The direct link to the Puget Sound Community is:
https://community.aaii.com/communities/community-home?CommunityKey=1a4fd959-8ba1-446d-8495-0a429203fda0

What is available in Community?

You can join multiple AAII Communities

- The best way to "join" another chapter is by choosing the chapter in My Account. You'll show up as a member of that Community in a day or so. Direct link: www.aaii.com/ChapterEmail
- You can join as many chapters as you wish – many now have online meetings so you are not limited by a driving distance or weather.

You can join Special Interest Groups

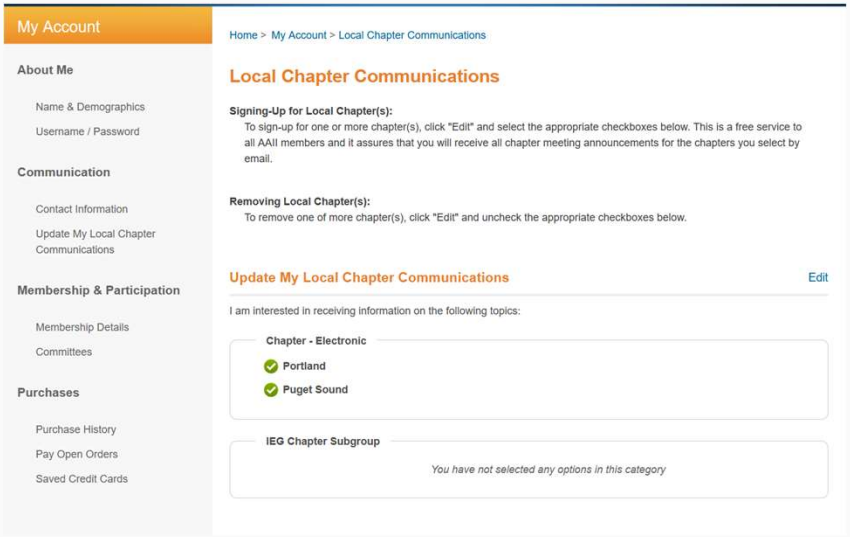
- On the community main page, use the "All Communities"dropdown to select "Special Interest Group (SIG)"

Note there are many online SIGs available.

Review "Events"

- Click "Upcoming Events" – you can see details on meetings all over the country. Many chapters have Zoom options and some do hybrid (Zoom and in person)
- You can also view the "Event Calendar" by month.
- Chapters are encouraged to post their meetings as far ahead as they can.

How To Get Local Chapter Communications



This "adds" you to that chapter's community .

2024 Meetings

We have tentatively scheduled the following meetings for 2024:

- March 20, 2024 – Greg Geisler – Tax-Efficient Order to Invest and Pay down Debts to Maximize Wealth at Retirement (online meeting)
- May 2024 – David Keller, Stockcharts.com (online meeting) - https://stockcharts.com/articles/mindfulinvestor/about.html David has a blog called The Mindful Investor: https://stockcharts.com/articles/mindfulinvestor/
- July 2024 – Paul Merriman and Chris Pedersen (online meeting)
- Sept 2024 – open
- Nov 2024 – open

AAII Speakers

- Charles Rotblut
  - A Simple Process to Achieve Financial Goals
  - Investing at the Intersect of Value, Momentum and Quality
  - A One-Page Wealth-Building Plan for a Successful Retirement
- Wayne Thorpe
  - Identifying Sustainable Growth Stocks
  - Factor Investing
  - Determining a Stock's True Worth
  - Finding a Stock Winner: First-Step Screening
  - AAII Shadow Stock Portfolio: From Theory to Practical Application
- Ray Rondeau
  - AAII's Essential Investing Principles and Strategies
  - Mastering the What, How & When With Investments and Their Executions

PLANNING FOR OUR FUTURE

What topics are of interest to you?

- **Open Discussion**
- **Poll/Survey**

- **Do you have speakers you would like to hear?**
  - Open Discussion
  - Poll/Survey
- **What is your preference – online meetings versus in-person meetings.**
  - Open Discussion
  - Poll/Survey

PLANNING FOR OUR FUTURE

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PLANNING FOR OUR FUTURE

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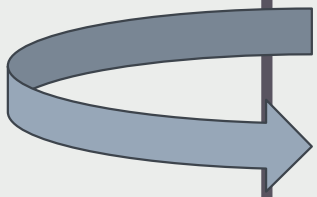

What is your preference – online meetings versus in-person meetings.

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THANK YOU

Puget Sound AAII Board

https://aaiips.org