

## Meeting Format Puget Sound Chapter Copy

AAII Chapter Webinar created at Jan 24, 2024 10:50 PM · 1 question

Responses

10

Typical Time Spent

1.6 minutes

Completion Rate ⓘ

100%

### Question Summary

1. Which meeting format do you prefer? (Single Choice)

10/10 (100)% answered

Online only	1/10 (10%)
In person only	0/10 (0%)
A combination of in person and online with live streaming	5/10 (50%)
A combination of in person and online with live stream in person	4/10 (40%)

A combination of in person and online without live streaming the in person meeting

Choice 3 should have said without live streaming—see correction textbook. Those who responded knew of the correction before selecting their answers.

### Topics of Interest Survey:

Note: Had to paste in three sections as you cannot print the report, you can just download the details.

# PugetSoundChapter Poll 1: Meeting Topics Copy

AAII Chapter Webinar created at Jan 24, 2024 10:32 PM · 2 questions

Responses

15

Typical Time Spent

2.6 minutes

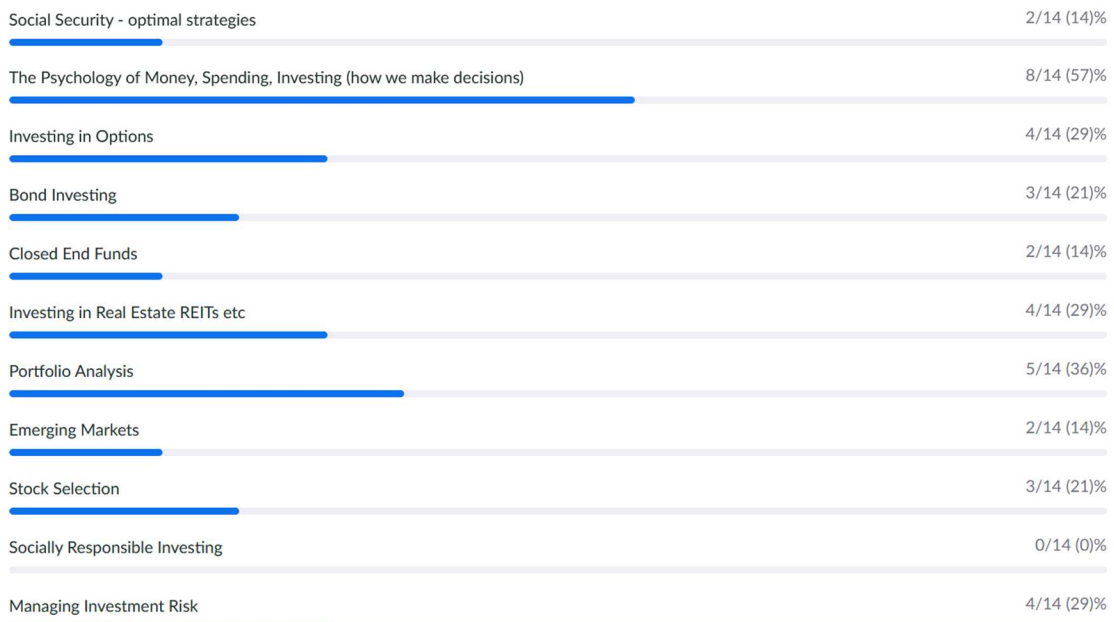
Completion Rate ⓘ

26.7%

## Question Summary

1. Which of the following investing topics interest you? Select as many topics as you wish. (Multiple Choice)

14/15 (93)% answered



The US and world economy outlook	0/14 (0)%
Retirement Spending - Steps to take so you will not run out of money	3/14 (21)%
Long Term Care Insurance -- Should I or Shouldn't I?	2/14 (14)%
Important Financial Documents You Should Have	5/14 (36)%
Trends in Investments over time	2/14 (14)%
Tax Efficient Investment Strategies	7/14 (50)%
Tax Advantaged Trusts	5/14 (36)%
Estate Tax Update - Federal and State of Washington (Steps you can take to preserve assets for your heirs)	5/14 (36)%
Cryptocurrency	1/14 (7)%
Annuities	2/14 (14)%
Charles Rotblut: A Simple Process to Achieve Financial Goals	3/14 (21)%
Charles Rotblut: Investing at the Intersect of Value, Momentum and Quality	3/14 (21)%
Charles Rotblut: A One-Page Wealth-Building Plan for a Successful Retirement	1/14 (7)%
Ray Rondeau: AAI's Essential Investing Principles and Strategies	2/14 (14)%
Ray Rondeau: Mastering the What, How & When With Investments and Their Executions	2/14 (14)%
Wayne A. Thorp: Identifying Sustainable Growth Stocks	2/14 (14)%
Wayne A. Thorp: Factor Investing	1/14 (7)%
Wayne A. Thorp: Determining a Stock's True Worth	0/14 (0)%

Housing Decisions in Retirement (Reverse Mortgage, etc)	2/14 (14)%
SEC - How your money held by brokers is protected	1/14 (7)%
FDIC - History of Financial Crises and how the FDIC protects assets	2/14 (14)%

2. Please add any additional topics of interest to you that are not on this list. (Long Answer)

5/15 (33)% answered

Guest

Protecting investments from downside risks

Guest

How to cull out losers from your portfolio without making it 'hurt' so much.

JGShaw@live.com

Quantifying the risk, alpha, etc of a portfolio built only of mutual funds and ETFs.

Guest

Municipal Bonds

Guest

World Economic Forum (WEF)

## Speakers - Puget Sound Chapter

AAll Chapter Webinar created at Jan 17, 2024 11:27 AM · 2 questions

Responses

9

Typical Time Spent

1.2 minutes

Completion Rate ⓘ

11.1%

### Question Summary

1. Which of the following speakers sound interesting to you? (Multiple Choice)

8/9 (89)% answered

AAll Headquarters: Charles Rotblut

7/8 (88)%

AAll Headquarters: Ray Rondeau

2/8 (25)%

AAll Headquarters: Wayne Thorpe

3/8 (38)%

2. Do you have a speaker name you wish to present? Answer 1 (Fill in The Blank)

2/9 (22)% answered

Guest

Perth Tolle (Freedom 100 ETF)

Guest

gary kaltbaum, kaltbaum management in FL.