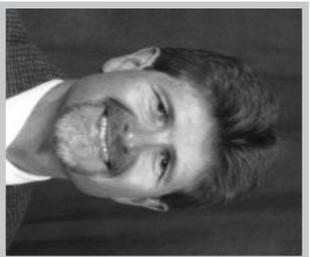


THE KEY TO BETTER INVESTMENTS



Michael Osteen
Chief Investment Strategist,
Port Wren Capital LLC

JOIN US AND LEARN

- The most critical component to capital appreciation in the long term
- How to look at stocks as a total business, not just a share price in the business paper

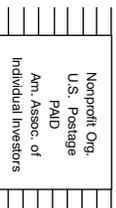


RESEARCH
TRIANGLE
MEETING

Saturday
November 12, 2016



625 N MICHIGAN AVE
SUITE 1900
CHICAGO, IL 60611-3151
(800) 428-2244



Chapter Information

Contact Duane Heidel, d.heidel@att.net
Email info@aaiirtp.org
Web Page www.aaii.com/localchapters
Website www.aaiirtp.org

Special Interest Groups

All groups meet at Panera Bread, 7840 Alexander Promenade Place across from Briar Creek Mall. No charge. Directions at www.aaiirtp.org.

INVESTMENT INCOME

Meets the first Saturday of the month at 9:30 a.m.

OPTIONS

Meets the fourth Saturday of the month at 9:30 a.m.

Future Meeting

Saturday, December 10, 2016

Topic: **HOLIDAY PARTY**
Speaker: **Guest Speaker TBA**

Future Meeting

Saturday, January 14, 2017

Topic: **2017 MARKET OUTLOOK**
Speaker: **Dennis Stearns**
Stearns Financial Group

Future Meeting

Saturday, February 11, 2017

Topic: **SIMPLE, ROBUST METHODS TO GROW & PROTECT YOUR PORTFOLIO**
Speaker: **Nicholas Atkeson**
Delta Investment Management LLC

Meeting Details

Saturday, November 12, 2016

NEW LOCATION!

WAKE TECH WESTERN WAKE CAMPUS

Room 118

3434 Kildare Farm Road
Cary, NC 27518

SCHEDULE

Registration/Social,

9:30 a.m.

Program, 10:00 a.m.

Q&A, 11:00 a.m

FEES

At the Door

Everyone, **\$5**/person

REFUND POLICY

No Refunds

Driving Directions

From I-440 or I-40 take the US-1 S/
US-64 W exit toward Apex/Sanford.

Once off the exit ramp, you will be on
an access road that parallels US-1/
US-64. South Hills Mall will be on
your right and Crossroads Mall on
your left.

Get in the left-hand lane and continue
until the access road merges onto
US-1/US-64.

Travel approximately 1 mile and take
the CARY PKWY exit.

Keep **RIGHT** at the top of the exit
ramp, which will merge onto CARY
PKWY.

Turn **LEFT** onto **KILDAIRE FARM
ROAD** at the traffic light just past
Bunky's car wash.

Travel about 4 miles south on
KILDARE FARM ROAD.

WESTERN WAKE CAMPUS is on
your **RIGHT** just prior to the intersec-
tion with **TEN-TEN Road**.

The AAI Research Triangle Chapter Presents...

Saturday, November 12, 2016

THE KEY TO BETTER INVESTMENTS

Michael Osteen

*Chief Investment Strategist,
Port Wren Capital LLC*

YOU WILL LEARN

- The most critical component to capital appreciation in the long term
- How to look at stocks as a total business, not just a share price in the business paper
- The necessity of knowing and understanding the story behind a company

Numerous investing portfolios have demonstrated above-average returns by using value investing techniques that date back to 1928. Value investing has been one of the best-known stock picking strategies since its introduction by Benjamin Graham and David Dodd, and it was made more popular by one of Graham's students, Warren Buffett. The concept is simple, but there are various ways to implement these strategies. Michael Osteen, an accomplished value investor, author and financial contributor, will speak about the key behind successful investing and his distinct contrarian strategies. As Warren Buffett says, "Price is what you pay. Value is what you get."



Michael Osteen is an accomplished value investor, author, speaker and investment contributor.

As a successful serial entrepreneur, he brings a very unique perspective to value investing unlike many others: He obtained an average realized gain of 83% in 60 months. In his role at Port Wren, he manages the private equity portfolio and conducts research.

His published articles are featured in numerous investment venues, including MarketWatch, Investopedia and Seeking Alpha, among others. He also speaks to groups ranging from service organizations, networking associations to investment clubs.

Osteen holds an MBA from Rivier University in New Hampshire, as well as a B.S. degree with honors from Clemson University in South Carolina.

**Plug into the investing community
with your local chapter!**

Face-to-face investment education
from renowned local and national speakers.

The opinions of speakers are their own and not necessarily those of AAI. It is not the policy of AAI or its local chapters, officers or directors to promote any specific investments or techniques of analysis. Presentations are provided solely for informational purposes and should not be construed

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