



Local Chapter News

Rex Chen

AAII Orange County Chapter President Gave Talk at UC Irvine

On November 14th, 2006, AAI Orange County Chapter President Bob Welge gave a presentation to the Investment Club at UC Irvine. With a college student audience, the title of Bob's talk was on "Achieving Your Future Financial Goals." Bob went through a number of basic financial considerations on how to get started early, and gave a number of tips for stock screeners to the audience. The topics covered were:

- Financial policy and goals
- Inflation
- General market conditions and indicators
- Efficiency frontier—asset allocations
- Stock and Mutual fund selection criteria
 - Investment strategies
 - Fundamental analysis
 - Basic valuations
 - Screens and criteria
 - Mutual funds
- Risk measures and data
- When to sell

Overall, it was a fun and enjoyable experience for all.

