



## ADVANCED INVESTMENT AND PRACTICE TRANSITION SEMINARS

**New York, NY December 4-6, 2014**

**Chicago, IL December 11-13, 2014**

We are so pleased to be returning to Chicago and New York in prime holiday season to present our popular Advanced Investment and Practice Transition courses. We think that with the new content and exciting slate of outside speakers these will be some of the best seminars to date.

**We'll emphasize simple and sane long-term investing that combines** (1) a knowledge of investment history so that we have a sense of what is normal, with (2) a methodology for selecting and how to analyze individual investments, and (3) the right temperament for successful long-term investing. **The idea is that we will then know WHAT we are doing and WHY we are doing it and WHEN we should do it.** By understanding the value of the companies you own, you can add to your investments with confidence when the stock market periodically hangs fire sale prices on the shares of fine businesses -- as it will continue to do from time to time. In the meantime, we will selectively screen companies that the market seems to be under-valuing and that should be excellent long-term investments even if we buy them near the current market highs. We have invited the following terrific speakers who understand that this is first and foremost a teaching seminar.

### ***ALDEN STEWART ON U.S. STOCKS AND ALTERNATIVE INVESTMENTS – Chicago Meeting Only***

**We are thrilled that Al is returning to the Chicago Advanced Investment Seminar! This will be one of the highlights!** Al is the former head of Alliance Capital Management's Hudson River Group's equity department. Al ran the highly successful Growth Stock Account No. 4 and picked the stock managers for other funds. That means he, directly or indirectly, was behind the picking for tens of billions of dollars in stock funds. Now, he is retired and investing his own portfolio. Al will give his current market insights, including why his U.S. stock exposure is capped at 35%, why he likes Asia, Russia, Mexico and Brazil, why he owns no bonds in any currency with a duration of more than one year, and why he's adding to his residential real estate holdings. Al will also provide his top current book recommendations – both financial and otherwise. After hearing his presentation, you'll probably agree with the consensus opinion that "Al is the smartest person in the room."

### ***BRIAN CHAIT ON STOCKS – New York and Chicago Meetings***

**Lynx Capital Group Ltd., Cleveland** - Brian has in excess of 30 years of investment experience with many different perspectives from working in the brokerage industry, portfolio manager of hedge funds and with a Multi-Billion dollar wealth management firm as co-chief investment officer. He will give a comprehensive market overview with opportunities he perceives and areas he thinks one should avoid. He will give his thoughts on portfolio construction and risk management, introducing concepts adopted by sophisticated investors and large family offices. He will also discuss reducing portfolio volatility through the use of options and alternatives to fixed rate bonds. Brian will also reinforce his thoughts on using ETF's (exchange traded funds) as part of an overall portfolio to maximize opportunities and improve risk control when needed. He will give attendees a specific list of ideas in dividend stocks and some sectors that look undervalued.

### ***STUART KLINE ON REAL ESTATE – New York and Chicago Meetings***

**Chase Properties, Ltd., Cleveland** – We are very excited to add this new and exciting aspect to the seminar. Stuart runs the very successful Chase Properties, Ltd. in which we happen to be investors. Chase owns and operates shopping centers in 14 States in the Northeast, Midwest and Southeast. They are a fully integrated shopping center company performing all aspects of acquisition, development, leasing, construction management, legal, accounting and facilities management for their properties. Their anchor tenants include Kohl's, Target, Walmart, TJ Maxx, Lowe's, Bed, Bath & Beyond, and many others. Stuart will also be discussing various ways for individuals to invest in real estate, structuring of different types of real estate vehicles, potential risks and rewards and "where we are" in the marketplace today. Stuart is a graduate of The Wharton School of Finance, University of Pennsylvania (B.S. in Economics) and New York Law School.

### ***MICHAEL BOULEGERIS ON STOCKS – New York Meeting Only***

**Boulegeris Investments, Inc. Atlanta** – We are thrilled to have Michael Boulegeris back for our New York seminar. A graduate of West Point, Mike is the founder of Boulegeris Investments, Inc., an SEC-registered investment advisor. Mr. Boulegeris is also one of the Co-Founders of MAP Pharmaceuticals Inc., a biopharmaceutical company that was acquired by Allergan, Inc. in March 2013. Boulegeris Investments achieved a 146.7% cumulative total return on all discretionary equity

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accounts under management from December 31, 2001 to August 31, 2014, versus a comparable 125.0% total return for the S&P 500. Among the many topics that Mike will address are the anticipated normalization of interest rates, market anomalies, and the ongoing revolution in novel therapeutics advancing the pharmaceutical industry. He will tie up the presentation by discussing the direction of his research to identify specific sectors and individual companies that should thrive in the dynamic global macro environment.

## NEW YORK, NY – MARRIOTT EASTSIDE

There is no city in the world like New York and The Marriott is in a perfect location to explore it. It is located on Lexington Avenue and 49<sup>th</sup> Street near Rockefeller Center, Central Park, Broadway theaters, numerous museums and top shopping on Fifth and Madison Avenues. After a \$24 million guest room renovation, the Marriott looks wonderful. A limited number of rooms have been blocked for our group at *The Marriott Eastside* at the group rate of **\$399.00**. **These rooms will be held as a block, until November 12, 2014.**

## CHICAGO, ILLINOIS – THE DRAKE

The Drake is one of Chicago's outstanding hotels and is ideally located for shopping and dining on North Michigan Avenue, Chicago's premier address, otherwise known as the "Magnificent Mile." A limited number of rooms have been blocked for our group at *The Drake Hotel* at the group rate of **\$209.00 for single or double occupancy**. **These rooms will be held as a block until November 10, 2014. IN THE PAST, CHICAGO HAS SOLD OUT EARLY EVERY YEAR.**

### SEMINAR REGISTRATION FORM

NAME: \_\_\_\_\_ DEGREE \_\_\_\_\_  
 SPOUSE: \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_  
 CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
 PHONE O: \_\_\_\_\_ PHONE H: \_\_\_\_\_ PHONE C: \_\_\_\_\_ FAX: \_\_\_\_\_  
 EMAIL ADDRESS: \_\_\_\_\_  
 METHOD OF PAYMENT: CHECK: \_\_\_\_\_ MASTERCARD: \_\_\_\_\_ VISA: \_\_\_\_\_ DISCOVER: \_\_\_\_\_  
 CARD NO.: \_\_\_\_\_ EXPIRE DATE: \_\_\_\_\_ CVV: \_\_\_\_\_  
 CARDHOLDER'S NAME: \_\_\_\_\_  
 CREDIT CARD BILLING ADDRESS: \_\_\_\_\_  
 CARDHOLDER'S SIGNATURE: \_\_\_\_\_

SEMINARS 2014-2015 (Meeting Dates are given)		DOCTOR ONLY	DOCTOR AND SPOUSE	Registration Fee within 60 days of seminar	SEND INFO ONLY	AMOUNT
<b>AGGRESSIVE BUSINESS, TAX AND PRACTICE MANAGEMENT FOR THE DOCTOR</b>						
RIVERIA MAYA	December 27-31, 2014	\$1,085*	\$1,275*	\$1,135/\$1,325		
ST. THOMAS, VI	February 2-6, 2015	\$1,085*	\$1,275*	\$1,135/\$1,325		
CURACAO	February 9-13, 2015	\$1,085*	\$1,275*	\$1,135/\$1,325		
TELLURIDE, CO	February 22-25, 2015	\$1,125*	\$1,315*	\$1,175/\$1,365		
<b>ADVANCED INVESTMENT SEMINAR (Two Days)</b>						
NEW YORK, NY	December 5-6, 2014	\$1,045*	\$1,240*	\$1,095/\$1,290		
CHICAGO, IL	December 12-13, 2014	\$1,045*	\$1,240*	\$1,095/\$1,290		
<b>PRACTICE TRANSITION SEMINARS (One Day)</b>						
BRASELTON, GA – Chateau Elan	October 24-25, 2014	\$710*	\$820*	\$760/\$870		
NEW YORK, NY	December 4, 2014	\$745*	\$855*	\$795/\$905		
CHICAGO, IL	December 11, 2014	\$745*	\$855*	\$795/\$905		
NASHVILLE, TN	May 2-3, 2015	\$745*	\$855*	\$795/\$905		
<b>RETIRED DOCTOR SEMINAR</b>						
BRASELTON, GA – Chateau Elan	October 25-26, 2014	\$685*	\$735*	\$735/\$785		
<b>YOUNG DOCTOR SEMINAR</b>						
NASHVILLE, TN	April 30-May 2, 2015	\$625*	\$650*	\$675/\$700		
<b>ONE DAY TAX UPDATE SEMINAR</b>						
CUBA	March 8-12, 2015	\$495 for doctor only or for doctor and spouse				
						<b>TOTAL AMOUNT</b>
*The above rates already reflect a \$50 discount if registration is received 60 days prior to the seminar. An additional \$50 is added if registering within 60 days of the seminar. If registering at the door the fee will be an additional \$100.00.						
CANCELLATION: Cancellations must be received in writing 30 days prior to the seminar and are subject to a \$50 processing fee. No refunds will be issued within 30 days of the seminar.						