



## ADVANCED INVESTMENT AND PRACTICE TRANSITION SEMINARS

**New York, NY December 3-5, 2015**

**Chicago, IL December 10-12, 2015**

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.

### ***LAURA LaROSA ON STOCKS AND FIXED INCOME INVESTMENTS – New York and Chicago***

**Glenmede, Philadelphia** - Laura is Director of Portfolio Management at Glenmede, responsible for 60 investment professionals and over \$16 billion in client assets. She is a member of the company's Management and Investment Policy Committees. Laura joined Glenmede in 1994 and was previously Glenmede's Director of Fixed Income Management, responsible for the management of tax-exempt and taxable bonds, directing a team that oversaw more than \$7 billion of assets under management. Laura has more than 30 years experience in bond trading and portfolio management, and will speak on Glenmede's economic and market outlook as well as how to invest alongside your values.

### ***RYAN NIELSEN ON BONDS – Chicago Seminar Only***

**BlackRock** - Ryan is a Vice President at BlackRock investments and member of their Preferred Portfolio Management team. Ryan is hired by outside investment advisors to oversee the taxable and tax-exempt bond accounts of high net worth individuals and institutional clients. Before joining BlackRock in 2011, Ryan was a fixed income portfolio manager with TIAA-CREF Trust Company where he managed intermediate taxable and tax-exempt portfolios, and before that, he worked with BB&T Asset Management Group and Merrill Lynch. Before entering the financial sector, Ryan spent more than four years as an Army officer with the 82nd Airborne Division at Fort Bragg, NC and continues to serve as a Lieutenant in the Army Reserve. Ryan will discuss opportunities in the bond market, how to buy bonds and how the bond markets really work.

### ***JOHN CUSICK ON MASTER LIMITED PARTNERSHIPS – New York Seminar Only***

**Miller/Howard Investments, Inc.** - John is a Senior Research Analyst at Miller/Howard investments in New York with an expertise in North American energy, including partnerships focused on natural gas, liquids and exploration & production. Prior to joining Miller/Howard, John spent more than a decade at Oppenheimer & Co. in New York as a senior research analyst in the "midstream" sector and later as a senior vice president and research analyst at Wunderlich Securities. John will discuss the energy sector with a special focus on master limited partnerships (MLPs), including why these are a sensible income investment and where he sees opportunities.

### ***BRIAN CHAIT ON STOCKS – New York Seminar Only***

**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 has spoken at several prior seminars and was well received. He will give a comprehensive market overview with opportunities he perceives and areas he thinks one should avoid. He will also talk on the "Worst Mistakes Investors Make." As stock markets are governed by fear and greed there are no rules that work consistently. Investors tend to throw out all logic and let their emotions control their investment decisions rather than sticking to a logical plan and rational decision-making. There are strategies investors can use to mitigate common mistakes that drain long-term portfolio returns.

**[PLEASE TURN OVER FOR MORE INFORMATION]**

## MICHAEL BOULEGERIS ON STOCKS – Chicago Seminar Only

**Boulegeris Investments, Inc. Atlanta** – We are thrilled to have Michael Boulegeris back for our Chicago 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 in March 2013. Boulegeris Investments achieved a 153.0% cumulative total return on all discretionary equity accounts under management from December 31, 2001 to December 31, 2014, versus a comparable 133.0% total return for the S&P 500. Among the many topics that Mike will address are the anticipated normalization of interest rates and the ongoing revolution in novel therapeutics advancing the pharmaceutical industry. He will tie up the presentation 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. Rooms have been blocked for our group at **Marriott Eastside** at the group rate of **\$399.00**. **These rooms will be held until November 9, 2015.**

## CHICAGO, ILLINOIS – THE DRAKE

Set atop The Water Tower Place, the luxurious 5-star Ritz Carlton marks and exclusive retreat high above the Magnificent Mile in Chicago's Gold Coast. A limited number of rooms have been blocked for our group at **The Ritz Carlton** at the group rate of **\$230.00 for single or double occupancy**. **These rooms will be held as a block until November 10, 2015.**

### 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 2015-2016 (Meeting Dates are given)	DOCTOR ONLY	DOCTOR & SPOUSE	Registration Fee within 60 days of seminar	SEND INFO	AMOUNT
<b>AGGRESSIVE BUSINESS, TAX AND PRACTICE MANAGEMENT FOR THE DOCTOR</b>					
ABERDEEN, SD (Pheasant Hunt)      October 1-4, 2015	\$795*	\$1,590*	\$845/\$1,640		
PINEHURST, NC (Mini-Week)      October 23-25, 2015	\$925*	\$1,055*	\$975/\$1,105		
ST. THOMAS, VI      February 1-5, 2016	\$1,120*	\$1,310*	\$1,170/\$1,360		
GRENADA      February 8-12, 2016	\$1,120*	\$1,310*	\$1,170/\$1,360		
CRESTED BUTTE, CO      February 28-March 2, 2016	\$1,160*	\$1,350*	\$1,210/\$1,400		
COSTA RICA      March 28-April 1, 2016	\$1,120*	\$1,310*	\$1,170/\$1,360		
ASHEVILLE, NC      May 19-21, 2016	\$955*	\$1,085*	\$1,005/\$1,135		
<b>ADVANCED INVESTMENT SEMINAR (Two Days)</b>					
NEW YORK, NY      December 4-5, 2015	\$1,095*	\$1,290*	\$1,145/\$1,340		
CHICAGO, IL      December 11-12, 2015	\$1,095*	\$1,290*	\$1,145/\$1,340		
<b>PRACTICE TRANSITION SEMINARS (One Day)</b>					
NAPLES, FL      November 13-14, 2015	\$745*	\$855*	\$795/\$905		
NEW YORK, NY      December 3, 2015	\$770*	\$880*	\$820/\$930		
CHICAGO, IL      December 10, 2015	\$770*	\$880*	\$820/\$930		
WASHINGTON, DC      April 30-May 1, 2016	\$770*	\$880*	\$820/\$930		
<b>RETIRED DOCTOR SEMINAR</b>					
NAPLES, FL      November 14-15, 2015	\$710*	\$760*	\$760/\$810		
<b>YOUNG DOCTOR SEMINAR</b>					
WASHINGTON, DC      April 28-30, 2016	\$650*	\$700*	\$700/\$750		
<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.					