

Upcoming Chapter Meeting: AAI Research Triangle



Date: Saturday, August 11, 2012

Topic: Positioning Your Portfolio to Generate Sustainable Cash Flow

Speaker: Mitch Reiner, Investment Adviser, Chief Operating Officer and Chief Investment Officer, Capital Investment Advisors (CIA)

Mitch Reiner will be talking about Capital Investment Advisors (CIA), its approach to income investing and how you can begin thinking about getting more cash flow out of your investments. There are a number of asset categories to consider; the task is to understand each category (real estate investment trusts, closed-end funds, master limited partnerships, bonds, etc.), how it moves in relation to another category and the effect that the market has on their distributions. The goal of an income portfolio is to generate sustainable income despite market volatility. Reiner will discuss CIA's basic "Bucket Approach" of allocating your assets. Further, Reiner will outline some of the asset classes that make up the income bucket and crucial characteristics to examine and to identify an opportunity within each category.

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