

Upcoming Chapter Meeting: AAI Orange County



Date: Saturday, October 26, 2013

Topic: A Tale of Two Strategies: Bond Funds Versus Individual Bonds

Speaker: Veronica Atkinson, Vice President and Investment Officer, Zions Bank Capital Markets

The discussion will cover fixed-income investing and the advisability of investing in bond funds versus purchasing individual bonds. To make that decision, the discussion will focus on two key criteria: individual circumstances (age, health, employment status, tax bracket, net worth, investment understanding, etc.) and investment objectives (growth, income, preservation of principal, etc.) of the investor. Veronica will address the advantages and disadvantages to either approach, given a generalized set of circumstances. The goal is to help attendees develop a more thorough understanding of which approach may be most appropriate for them, given their individual situation.

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