

Upcoming Chapter Meeting: AAI Phoenix



Date: Saturday, February 11, 2012

Topic: Morningstar's Best Ideas for 2012 and Beyond

Speaker: Christine Benz, Director of Personal Finance, Morningstar

In this presentation, Christine Benz will share a broad market outlook based on Morningstar equity analysts' bottom-up research. She'll discuss which market sectors appear relatively attractive and which to avoid, and she will also provide specific stock, mutual fund and ETF examples that illustrate these themes. In addition, she'll discuss the current fixed-income environment and share some "best ideas" among actively managed bond mutual funds. Finally, she'll cover some "best ideas" for personal finance, including the importance of employing tax-efficient strategies and creating a portfolio bulwark against inflation.

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