

# Upcoming Chapter Meetings: AAI Central Florida and Southwest Florida



Dates: Wednesday, February 15, 2012, and Thursday, February 16, 2012

Topic: Ten Lessons Learned From Managing a Mutual Fund

Speaker: Louis ("Lou") E. Conrad II, CFA, President, COMPASS Wealth Management LLC

A behind-the-scenes look at the conflicts between mutual fund companies and their shareholders based upon the experiences of this former mutual fund manager. The presentation will review the challenges that face mutual fund investors as outsiders and why you should invest with a healthy dose of skepticism. One of the 10 lessons covered will address the pressure for funds to be large and the investment advantage of funds that are small.

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