

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, OCTOBER 28, 2015, 11:50AM,  
Fellowship Hall, Lord of Life Lutheran Church  
5114 Twinbrook Road, Fairfax, VA 22032**

**See revised schedule of Forum dates and times.**

***Market Perspective.*** It is again safe to look at your brokerage account! Markets had another big week, with the DOW up 2.5%; the S&P up 2.1%; and the NASDAQ up 3.0%. Drivers were good third quarter earnings, especially in tech, and plans by China and Europe for economic stimulus. The S&P has crawled back into positive territory for 2015, and is now just 2.7% under its all-time high back in July.

***Annuities.*** Mike May, a Financial Planner with Sagemark Consulting, a division of Lincoln Financial Advisors Corp, and who has given many OLLI presentations on financial topics, will discuss annuities. It will be a general discussion, including recent innovations in annuities.

***Future Topics.***

*Closed-End Funds on November 4.* Sylvia Auton and I will discuss Closed-End Funds on November 4.

*Taxes and Investments on November 11.* Brenda Bloch-Young will discuss impact of taxes on investments on November 11.

*Airlines.* James Dann will talk about airlines and airline stocks in November or December.

***Buys and Sells (week of October 21)***

*Buys*

General Electric (GE)

Phillip Morris (PM)

Wal Mart (WMT)

A O Smith (AOS) - water heaters. MC: \$7B

Atwood Oceanics (ATW) - offshore drilling. MC: \$1B. 52 week range: \$14.15 - \$42.24

*Sells*

Schlumberger (SLB)

*Thinking About . . .*

CVS (CVS)

Ferrari (RACE)

### ***Investment Forum Dates, Times and Place***

Please note the following venue changes until the end of the Fall term. Also be alert to e-mail notifications from OLLI. ***We will be meeting at Lord of Life through the end of the Fall term.***

October 28. Lord of Life. 11:50AM to 1:15PM

November 4. Lord of Life. 11:50AM to 1:15PM

November 11. Lord of Life. 11:50AM to 1:15PM. Last session of the Fall term

Between term "club" meetings - November 18 to January 13, 2016

***Mason has postponed the repair of the Tallwood parking lot to next Summer. We will be meeting at Tallwood on Wednesdays, at 10:30AM to 12 Noon, on the following dates:***

November 18

December 2

December 9

December 16

January 6, 2016

January 13

The Winter term begins January 20.

Notification of changes to dates, times, and venues and cancellations.

With OLLI's growth and meeting in more locations, changes such as we have seen recently will likely become a fact of life. I will continue to post upcoming Forum dates, times, and places in the Agenda. OLLI sends out change notifications via e-mail to registered class participants, sometimes only a few hours before the classes for weather cancellations, no heat, etc.. However, if you are not registered for the class, you will not receive these notifications from OLLI. I will attempt to send out last-minute changes or cancellations via e-mail using my distribution list, which should include most of you, registered or not.

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