

What Managed Funds and LICs offer value; Through the eyes of a fund manager

Daryl Wilson

Do it yourself investing...My way

Lasse Petersen

**Information Meeting
Brisbane Group
Wednesday 4th July @ 12.30**

**Wesley House
140 Ann St
Brisbane**

12.00	Registration
12.30	What Managed Funds and LICs offer value; Through the eyes of a fund manager <i>Daryl Wilson</i>

Daryl Wilson from Affluence will provide an update on their current investment portfolio, where they see value and some Managed Funds and LICs they like right now.

Daryl Wilson: Director/CEO/Portfolio Manager Affluence Funds Management

Daryl has experience across all aspects of funds management including investment, operations and capital raising and is responsible for investment and funds management activities at Affluence. Daryl founded Affluence Funds Management in 2015 and is co-manager of all investment portfolios.

Prior to forming Affluence, Daryl was a Director of Cromwell Property Group, an ASX-listed property and fund manager, for over 15 years. From 2008 until 2015, Daryl was responsible for Cromwell's unlisted funds management business, which created and managed investment funds worth over \$1 billion and delivered impressive returns for the thousands of investors in these funds. Daryl holds a Bachelor of Commerce, a Diploma of Financial Planning and is a member of the Institute of Chartered Accountants.



Refreshments break: Available from adjacent coffee shop

1.45	Do it yourself investing...My way <i>Lasse Petersen</i>
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Lasse Petersen is a long standing AIA member who gave up his professional mining engineering career before 40, to pursue lifestyle and other interests... relying on his self managed investment portfolio - predominantly in ASX shares.

He will share his approach to self managed investing and experiences and lessons learnt along the way including selecting investments, risk management and the tools and structures he uses.

Lasse Petersen – AIA member

Born 1966, Lasse worked nearly 20 years in international coal mining industry incl. Asia, Africa, US & Australia. Subsequently he spent 10yrs working and volunteering in disaster relief operations from Earthquakes in Haiti & Tsunamis in Japan to Typhoons, Floods, & Conflict Volcano eruptions worldwide. Currently he tries to ensure a quieter life for his self managed investment portfolio.



Cost: Members & Members' Guests \$10pp / Non-Members \$15pp.

Australian Investors Association (ABN 75 052 411 999)
PO Box 1208, Oxenford QLD 4210
Tel: 1300 555 061 Fax: 07 5580 5587
Email: aia@investors.asn.au Website: www.investors.asn.au

We would like to encourage members to bring along their membership card to meetings. We will have plastic holders to enable the card to be used as a name badge. This will also ensure members are given the preferential lower members rate. Don't forget member's partners and guests are welcome to come along at member's rates.

Hope to see you there.

Rob Spence E: aiaqld@outlook.com



**AIA National Annual Conference
29th July - 1st August 2018
Marriott Resort & Spa Surfers Paradise**

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