



Terri Spath, Founder and Chief Investment Officer, Zuma Wealth

Bond Strategies for A Recession, Soft Landing and Anything Else

A collaboration of the Austin, Eastern Michigan, New York City and Portland
AAII Chapters and Income and Cash Flow SIG

2/20/24



Upcoming Highlighted Chapter Events

- Wednesday, March 13th @ 6:30 pm EST, New York City+
 - Cindy McLaughlin, Craig Israelsen and Todd Blickenstaff
 - Retirement Roundup
 - Zoom Only Meeting
- Wednesday, April 24th @ 7 pm CST (8:00 pm EST), Austin/San Antonio+
 - Pat Keough
 - Dividend Investing
- + represents the chapter is leading the event. Other chapters may co-host and/or co-market the event.
- For more information on our events please check out: <https://community.aaii.com/events/calendar>
- You are welcome to join our chapters virtually so you can participate in our events. To do so go to: <https://user.aaii.com/personifyebusiness/My-account/local-chapter-communications>
- These events don't happen without the help of volunteers like you! Volunteer for your local chapter to ensure you continue to receive great content in the way you want to consume it! To volunteer contact:
 - Austin/San Antonio: Robert Luedtke, Co-President, rluedtke@gmail.com
 - Eastern Michigan: Ron Gadoth, Communications, gadoth@msn.com
 - New York City: Hollis Wagenstein, Program Chair, hwagenstein@aaii.com
 - Portland: Todd Blickenstaff, President and Program Chair, trblick@yahoo.com



Housekeeping Items

- The presentation will last about 40 minutes
- Questions and Answers in the middle and at the end last for about 20 minutes.
 - Please enter your question(s) in Zoom as you think of them by clicking the Zoom Q&A button and then typing in your question.
- A copy of the slides will be made available in the Zoom chat box during the event
- A copy of the presentation and a recording of the webinar will also be available later at: <https://www.aaii.com/chapters>
 - Click the Austin/San Antonio chapter below the map
 - Click login at the top right of the page
 - Past presentations are found under the library tab



Terri Spath, CFA, CFP®

Terri's investment experience spans a quarter-century earning top performance marks stewarding billions of dollars at some of the largest investment shops. She brings the expertise that comes with managing money through the late '90s tech boom and bust, the 2007 recession, and the longest bull market on record that ran from 2009 to 2020.

A renowned expert, Terri is a regular guest on CNBC and Bloomberg TV and a sought-after industry speaker. She was named a "Top 10 Inspiring Women of 2022" by Industry Era Magazine and was shortlisted by the Women in Asset Management awards in 2019. Terri has been interviewed and quoted in hundreds of publications and lauded for making complex concepts simple.

Prior to forming Zuma Wealth, Terri was Chief Investment Officer at two large RIAs, including Mercer Advisors. She spent a dozen years at Franklin Templeton as a portfolio manager and analyst. Terri launched her career with roles at one of the largest investment banks on Wall Street in New York and at Fidelity Investments in Boston.

Terri's real-world expertise is rooted in a suite of top financial credentials: the CFA charter, the CFP® certification, an MBA in Finance from Columbia University, and an AB in Economics with Honors from the University of Michigan.

Terri started investing when her father introduced her to the concept of compound interest and she learned she could make money in her sleep.