



TSAA-SF Annual Conference 2016

“The Titans of Technical Analysis”

**Saturday, August 20th
8:00 am - 5:00 pm
Golden Gate University
San Francisco, CA**

Speakers:

Charles Kirkpatrick, CMT

“The Genius of Welles Wilder”

The inventor of indicators used by technicians more than any others, J. Welles Wilder, Jr. was a true pioneer in the field of technical analysis. Charles Kirkpatrick, CMT will present his work with Wilder’s Directional Movement indicators (“DMI”) and Average Directional Index (“ADX”) and include a discussion of the Average True Range, the Wilder method of measuring volatility. He will also present and discuss his personally favored Volatility System and Parabolic System (the “Parabolic SAR”), as well as Wilder’s famous Relative Strength Indicator (“RSI”).

Charles D. Kirkpatrick II, CMT, is president of Kirkpatrick & Company, Inc., a technical analysis research firm that publishes the *Market Strategist* investment newsletter. A past instructor in finance at the School of Business Administration, Fort Lewis College and Adjunct Professor of Finance at Brandeis University International Business School, he is a two-time winner of the Market Technicians Association’s prestigious Charles H. Dow Award for research in technical analysis, winner of the MTA Annual Award in 2008 for "outstanding contributions to the field of technical analysis", and co-winner with Julie Dahlquist in 2012 of the Mike Epstein Award from the MTA Educational Foundation for “long-term sponsorship of Technical Analysis in Academia.” He is a Chartered Market Technician, a past member of the board of directors of the Market Technicians Association, past editor of the *Journal of Technical Analysis*, past board member and vice-president of the Market Technicians Association Educational Foundation and a member of the American Association of Professional Technical Analysts (AAPTA). He co-authored *Technical Analysis: The Complete Source for Financial Market Technicians, 3rd ed*, the primary textbook for university graduate courses on technical analysis, authored *Beat the Market, Time the Markets: Using Technical Analysis to Interpret Economic Data*, and most recently *Kirkpatrick’s Investment and Trading Strategies*. He is a graduate of Phillips Exeter Academy, Harvard College (AB) and the Wharton School (MBA) and lives with his wife in Maine.

Hank Pruden, Ph.D.

“Leader of the Pack: How Wyckoff’s Composite Man Implements the Delay Rule”

With inspirations from the recent Disney Movie, “The Jungle Story”, coupled with the great team effort shown by the Golden State Warriors, I’ll characterize Wyckoff’s Composite Man in the role a Tactical Pool Operator who attracts a market following. That then will be crystalized and refined into an Archetype, “The Composite Operator”, the ideal market tactician. The third aspect of the presentation shall be a case-study illustration of that Wyckoff Composite Operator Implementing his essential decision model, “The Delay Rule”.

Dr. Hank Pruden, Ph.D. is a professor in the Edward S. Ageno School of Business at Golden Gate University in San Francisco, CA, where he has been teaching for 38 years. At Golden Gate University, he developed the accredited courses in technical market analysis in 1976. Since then, the curriculum has expanded to include advanced topics in technical analysis and trading. In his courses, Dr. Pruden emphasizes the psychology of trading as well as the use of technical analysis methods. He has published extensively in both areas. He has mentored individual and institutional traders in the field of technical analysis for many years. Dr. Pruden is the Executive Director of the Institute of Technical Market Analysis ("ITMA") and presently serves as Chairman of the Board and is Past President of the Technical Securities Analysts Association of San Francisco ("TSAA-SF"). Dr. Pruden was also on the Board of Directors of the Market Technicians Association ("MTA") and has served as Vice-chair of the International Federation of Technical Analysts ("IFTA"), receiving IFTA's Life Achievement Award in 2013. From 1982 to 1993 he was a member of the Board of Trustees of Golden Gate University.

W.H.C. (Charles) Bassetti

"Making Money the Old Fashioned Way: The Continuing Relevance of Edwards and Magee"

Though first published in 1948, *Technical Analysis of Stock Trends* might well have been written yesterday. Here we will look at the quintessence of the book and why it has weathered the years so well. Technical, psychological, philosophical, pragmatic...this text is often described as the cornerstone of Technical Analysis, and rightly so. The function of a cornerstone is to anchor and hold up a building – you can't construct a building without a cornerstone – and you risk your capital to build a system or an investing practice without a thorough knowledge of Edward and Magee. With a demonstration of some recent analytical successes achieved with E&M methods, Charles will show us Basing Points, the development of some of Magee's ideas, answer questions and share testimonials.

A client and then student of John Magee, Charles Bassetti has been trading for over fifty years. He was a Principal and Vice President of California's first licensed Commodity Trading Advisor; the CEO of Options Research Inc., the first company to computerize the Black-Scholes model (and a classmate of Fischer Black at Harvard); and Founder of Micro Options Research Corp., which implemented ORI systems on S&P computers. He also founded Options Research and Trading Ltd., which owned a seat on the Pacific Stock Exchange. Charles began his career as an installation systems engineer on the implementation of the Saturn Rocket Systems at NASA. He was the Project Engineer on the installation of the first major Control Data computers in Mexico, where he also was CEO of a computer services company.

Charles is the editor and preserver of Magee's works: Editor of the second, revised edition of Magee's book *General Semantics of Wall Street*; Editor and Coauthor of the eighth, ninth, and tenth editions of Edwards & Magee's *Technical Analysis of Stock Trends*; Editor and Coauthor of the second edition of *Analyzing Bar Charts for Profit* (retitled *The Introduction to the Magee System of Technical Analysis*). He is also the author of five other books: *Zen Simple: Beat the Market with a Ruler*; *Sacred Chickens*, *The Holy Grail and Dow Theory*; *Signals*; *10 Trading Lessons*; and *StairStops*.

Since 1999 as a Distinguished Adjunct Professor, he has taught a graduate seminar at Golden Gate University in San Francisco. During this time he has written an investment letter on the web at www.edwards-magee.com.

Corey Rosenbloom, CMT

"The Momentum Kick-off: Adapting Wyckoff's Sign of Strength to Today's Markets"

How can a "Momentum Burst" improve your trade recognition and trade management tactics? Corey will describe the "Kick-Off" pattern and trading tactic as applied to short-term and intraday strategies. The Kick-Off is an adaptation of Richard Wyckoff's "Sign of Strength" and "Sign of Weakness" concept using today's indicators and confirmation strategies. Corey will explain how a specific up-tick in momentum, using oscillators, volume, or market internals, can give you a leading edge to identify likely trend reversals - and a powerful trade set-up - earlier than your competition who often miss this elusive signal. By the end of the presentation, you will learn the specific trading tactics involved in recognizing, entering, managing, and exiting trading opportunities using the "Momentum Kick-Off."

Corey Rosenbloom, CMT, is a trader, educator, and analyst. He received his Chartered Market Technician's designation in 2009 and has been active in market research and education. Mr. Rosenbloom is the author of *The Complete Trading Course* (Wiley, 2011) and *The Life Cycle of a Stock Move* (Wiley, 2013). He has been a featured speaker at the International Traders Expo, World Money Show, and other conferences large and small. His goal is to create an education-based community dedicated to helping traders overcome fears and ease anxiety about risking their money to profit efficiently in the stock, options or futures markets. Corey has been investing since 1998, but discovered the world of trading during the bear market of 2001-2002 and began actively trading the market short-term in mid-2003. His methods are a hybrid of foundational price principles described by Charles Dow, Ralph Elliott, Richard Wyckoff and other pioneers of technical analysis. He trades his own account in futures and leading stocks and provides education, research, and analysis for short-term and intraday traders through www.afraidtotrade.com (founded in 2007).

Mathew Verdouw, CMT, CFTe

“WD Gann and his Master Trend Detector”

In this presentation, Mathew Verdouw, CMT, CFTe will introduce the Gann Swing Chart, showing how this unique method provides a fantastic way of identifying trend and can also be used in conjunction with other Technical Analysis tools to create a standalone trading system. Gann referred to his Swings as his "Master Trend Detector" and he used them to identify the direction of the markets. While the concept is simple, the reality of implementation can be very complex. Mathew will explain how the Swings are constructed, including some of the more difficult concepts around them, how the system works and show the quantitative testing that supports the concept that Gann created decades ago.

With an honors degree in Computer Systems Engineering and seeing a place in the market for a quality Technical Analysis software application that removed the limits on how traders wanted to analyze the markets, Mathew founded *Market Analyst* in 1996. Right from the very start, Gann tools and methods were a big part of the initial developments. From that point on, Mathew has made it his mission to build the very best software tools available without any biases of what is right or wrong. He has traveled the world seeking out and learning from some of the very best. In 2014, Mathew earned the CMT designation and, in 2015 was also awarded IFTA's CFTe designation. In June 2016, *Market Analyst* was rebranded as "*Optuma*" and continues to develop new and powerful ideas. As someone who has dedicated his life to building tools to help people uncover the information they need, and having the attitude that 'we can do anything', Mathew is set to drive innovation in this sector for many years to come.

Jeff Kennedy

“How to Integrate Elliott Wave Analysis into Your Trading”

Elliott Wave International Senior Analyst Jeffrey Kennedy will teach you how to incorporate Elliott Waves alongside other forms of technical analysis to identify high-probability trade setups – optimize your risk/reward and safely manage your market exposure. Kennedy's presentation will start with the basics of the Elliott Wave Principle and then walk you through practical trading applications that integrate a variety of popular technical indicators. You'll also learn key rules for managing your entry points and protective stops—skills critical to your trading success.

An analyst, trader, and Elliott wave instructor with 23 years of direct market experience, Jeffrey Kennedy is the editor of Elliott Wave International's *Commodity Junctures and Trader's Classroom*, an educational service that teaches traders how to enhance their strategies with the Wave Principle and other forms of technical analysis. In 2013, Jeffrey co-authored an Amazon Finance bestseller, "*Visual Guide to Elliott Wave Trading*" (Bloomberg Financial Series).

Kennedy has authored more than a dozen articles about using the Wave Principle in trading for magazines such as SFO (Stocks, Futures & Options), Tradersworld, Stocks & Commodities and The Technical Analyst. Jeffrey is a highly sought after speaker who has taught thousands of aspiring traders how to apply the Wave Principle. He has lectured in the United States, London, Paris, Zurich, Mumbai, Johannesburg, Melbourne, Singapore and Hong Kong. Jeffrey was also an adjunct professor in Technical Analysis for the Quantitative and Computational Finance program at the Georgia Institute of Technology (Georgia Tech) for five years (2010-2014).