



Waunakee Rotary Club

Feb. 3, 2010
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Tony Hellenbrand believes like a football team, a good investment strategy needs both defense and offense.

Tony gave his classification talk at the Jan. 27 Rotary meeting. One of the most recent members to join, Tony was born and raised in Waunakee and played football for the 2002 state championship Warrior team.

Tony went on to play for Michigan Tech on a football scholarship, but after several injuries, he was ready to transfer to UW-Madison and return home. However, Professor Dean Johnson of Michigan Tech consulted with Tony and convinced him to change his major from engineering to finance. Tony then joined the Applied Portfolio Management Program in the Michigan Tech School of Business and Finance, and the team won national investment competitions two years in a row, beating out others from MIT, Yale and Harvard.

After Tony appeared on CNBC, he was contacted by Stanford Phelps, chairman of S.N. Phelps & Co., Commonwealth Oil Refining Co., and Clear Springs Land Company.

He took a job with Phelps as gas and oil analyst in Greenwich, Conn.

But Tony missed the Midwest and the kind people, and said at all costs, he would return to Waunakee.

About a year and half later, he did.

He currently works for Investment Advisors International. Tony said people looking to invest have three concerns: outliving their

wealth, protecting their principal and investment performance.

While defensive investments will be protected when the market is down, it's important that investments continue to grow. Most investors lost money over the last 10 years, Tony said.

The idea is to grow one's financial investment faster than the rate of inflation. With active management, funds are available to be moved right away, Tony said. Such strategies can be put into place in 401K plans, as well, he said.

Tony quoted Warren Buffet, who said, "Rule No. 1 is never lose money. Rule No. 2 is never forget Rule No. 1."

Other news:

- Joanne Leonard's memorial resulted in donations of nearly \$2,000 for Polio Plus. With matching funds from Rotary International and the Bill and Melinda Gates Foundation, that should result in 25,000 inoculations for children.

- Doug Tuttrup, co-president of the nonprofit Orca swim team, thanked the club for the opportunity to work on Rotary in Lights. The funds received will be used to provide scholarships for swimmers and put toward an effort to install a UV filtration system at the high school pool.

- Ken Ballweg announced that the Wauktoberfest committee has begun meeting. The chair is Mike Shucha, and Chad Updike is the liaison for the club. Also, the Waunakee Community Foundation has a mentalist show planned for Feb. 19. Tickets are \$15.

- Mike Ableidinger has tickets for the WNC Super Bowl raffle. If

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Calendar of Events:

- Feb. 6 – Waunakee Neighborhood Connection Super Bowl party at Rex's
- Feb. 18-20 – Waunakee Winter Weekend.
- Feb. 19 – Waunakee Community Foundation Mentalist Show.
- March 2 – Super Raffle

you have tickets to turn in, see him.

- Gary Epping has tickets for the Super Raffle.

Guests: Gary Ziegler, guest of Tony Hellenbrand.

Birthdays: None.

Anniversaries: None.

Prayers: Feb. 3, Pat Durden; Feb. 10, Leonard Allen; Feb. 17, Susan Vergeront.

Programs: Feb. 3, club assembly.

Greeters: Feb. 3, Gene Smith and Dan Statz; Feb. 10, Duane Statz and Harriet Statz; Feb. 17, Ray Statz and Daren Steuart; Feb. 24, Don Tierney and Luke Tierney.

Make up meetings online

It's easy to make up a meeting on the Internet. The site is www.rotaryclubone.org. Print out the form and give it to Phil Willems, the club secretary.