

Welcome Guide

Bogleheads Mission:
“to raise the level of financial literacy of all Americans”

**Introduction to our
Bogleheads Resources**

History

- The **Bogleheads** group informally began in March 1998 when the Morningstar.com “Vanguard Diehards” forum was established to discuss Vanguard funds.
- Inspiration: Jack Bogle (1929-2019)
 - Founder and previous chief executive of The Vanguard Group.
 - Credited with creating the first index funds.
- Eighty (80) chapters across the USA
 - CA: Sacramento, San Diego, San Francisco, San Jose

Bogleheads Forum

<https://www.bogleheads.org/forum/index.php>

- Who? Volunteer Boards of Directors
- Purpose: **Forum** originally started to discuss Vanguard and its index funds. Now offers information on all types of financial matters, with tips on everything from retirement planning to how to pay for college.
- Structure:
 - Register to get an Account (Allow 24 hours)
 - Search Past Activity
 - Once registered: Ask Questions/Receive Answers
 - Members invited to Conferences

Bogleheads Forum (Cont'd)

Example: Two Sections: **US Investor/Community**

US INVESTORS






-  **Personal Investments**
Have a question about your personal investments? No matter how simple or complex, you can ask it here.
-  **Investing - Theory, News & General**
Discuss all general (i.e. non-personal) investing questions and issues, investing news, and theory.
-  **Personal Finance (Not Investing)**
Non-investing personal finance issues including insurance, credit, real estate, taxes, employment and legal issues such as trusts and wills

NON-US INVESTORS

-  **Non-US Investing**
For investors outside the US. Personal investments, personal finance, investing news and theory.
Sister forums: [Canada](#), [Spain](#) (en español)

Subforums:  Spain,  United Arab Emirates

COMMUNITY

-  **Personal Consumer Issues**
Questions on how we spend our money and our time - consumer goods and services, home and vehicle, leisure and recreational activities
-  **Local Chapters and Bogleheads Community**
Subforums:  US Chapters,  Non-US Chapters
-  **Forum Issues and Administration**
Discussions about the forum and contents

Bogleheads Wiki

<https://www.bogleheads.org/forum/index.php>





OR

<https://en.wikipedia.org/wiki/Bogle>

□ Purpose:

- A Collaborative undertaking by members of the **Bogleheads** Community.
- This **wiki** is a reference resource for investors.

□ Example:

WIKI	
	 The Bogleheads® Wiki: a collaborative work of the Bogleheads community <i>New Investors, Philosophy, Investment Policy Statement, Non-US domiciles</i>
	 Canada - finiki (wiki) A collaborative Canadian perspective on investing and personal finance

South Bay Bogleheads

Web Site: <https://southbaybogleheads.com/>

AKA: "Financial Wellness"

- Started 2015
 - To Join OR receive meeting notices send a email to:
info@southbaybogleheads.com
- Who? Volunteer Leadership Team
- Purpose of site:
 - Meeting Announcements
 - Library of Previous Presentations (2015-2020)
- Open to all

Boglehead Investment Principles

<https://www.bogleheads.org/blog/who-are-the-bogleheads/investment-principles/>

1. Living below your means
2. The advantages of investing early and often
3. Stock and bond market return and risk
4. Diversifying investments
5. The advantages of keeping investment costs low
6. Why Index?
7. Be mindful about taxes
8. The evidence against market timing
9. Simplicity
10. Staying the course

Investment Books to Consider:

Publication Date	Book
2014	The Bogleheads' Guide to Investing - Taylor Larimore, Michael LeBeouf, Mel Lindauer
2018	The Bogleheads' Guide to the Three-Fund Portfolio - Taylor Larimore
2014	If You Can: How Millennials Can Get Rich Slowly - William Bernstein (Free download )
2017	The Little Book of Common Sense Investing: The Only Way to Guarantee Your Fair Share of Stock Market Returns (10th Anniversary Edition) - John C. Bogle