



Investor Education at Its Best™

Charlotte, North Carolina

August 8-10, 2008

Leadership Training Session Descriptions

Friday Afternoon, August 8, 2008

12:00 PM – 12:15 PM

Introductions and Opening Remarks *University D*

12:20 PM – 1:10 PM

Lakeshore 1

Building a Super Presentation

Mary Ann Davis

This session is all about topics, ideas and techniques that have been tried and tested. You will view effective presentation examples to demonstrate key points. Topics include how to start, getting ideas, information sources, selecting appropriate media, using and improving screen captures, building interest, and teaching all levels of investors at the same time.

Lakeshore 2

Computerized Tools for Volunteer Organizations

Joe Craig

This session examines tools to help your volunteer group get organized, collaborate between face-to-face meetings, and communicate with your fellow volunteers and members. We will focus on free and low-cost online and telephony tools to help you build a better organization that is responsive to member needs.

University E

Start Your Own Investment Club

Lynn Ostrem

When you think about starting an investment club, are you worried about the finer details? This session provides all the basics, including a detailed systematic checklist and all the resources you need to get a successful club up and running.

1:15 PM – 2:05 PM

Lakeshore 1

SnagIt: Basic
Kathy Tegtmeier

This basic level session demonstrates how to use screen capture software to create highly effective documents by including images in your PowerPoint presentations, newsletters, and organization communications. You will see screen capture Input images from stock analysis software and Web pages, and learn how to place the Output screen captures into presentations and communications.

Lakeshore 2

Portfolio Manager
Matt Willms

Investors often ignore the important topic of portfolio management. This session is a popular presentation for teaching the BetterInvesting Portfolio Manager. It provides an overview of Portfolio Manager features, including transaction entry and allocation tools, easy setup by importing an Investor's Toolkit portfolio, and downloading data from the BetterInvesting's S&P Stock and Mutual Fund Data Services.

University E

Enhancing Club Member Participation
Diane Graese

This session offers ideas on how to increase club member participation. Help members overcome the fear factor, and make their participation easy and comfortable. We will discuss new ideas to make club meetings educational and fun.

2:15 PM – 3:05 PM

Lakeshore 1

PowerPoint: The Good, the Bad and the Ugly
Herb Barnett

This session focuses on how PowerPoint can be an effective, or terrible, teaching tool. We will examine content and design considerations for creating an effective slide show. There will be some review of the mechanics of creating a PPT, but only incidental to creating an effective presentation.

Lakeshore 2

Handy URLs for Stock Analysis Software
Bob Adams

You can implant useful URLs (web addresses) into your stock analysis software program. A click of a mouse button will provide an abundance of information to aid your judgment. Access estimates of sales and earnings growth rates, information on competitors, industry averages, and analyst reports. View company and industry news, institutional and insider ownership, and short interest. This session shows you how.

University E

Club Education: A Recipe for Success

Lynn Ostrem

Like a good recipe, club education must have just the right ingredients to be a hit! If information overload is stopping you in your tracks, this session will provide time-tested tips and tricks to find, organize, store, and present *years* of quality club education programs.

3:10 PM – 4:00 PM

Lakeshore 1

SnagIt: The Next Level

Kathy Tegtmeier

In this session, you will learn about special types of screen capture Inputs as well as how to edit the capture before inserting it into the presentation. There are many Output formats available and we will explore which works best. Finally, we will look at why, where, and how to store the images.

Lakeshore 2

Another Look at StockCentral

Marvin Kohn

StockCentral.com is a unique source of investment information. The web site provides stock analysis data, analysis tools, and an online investing community. Participants post stock evaluations and discuss them with other investors. The session examines many of the available tools and demonstrates how to incorporate them into an effective research strategy.

University E

Don't Do That! Avoid the Worst Practices in Club Accounting

Ira Smilovitz & Daniel Abraham

You're a trained club treasurer or Club Accounting instructor and you know the day-to-day procedures, but do know what *not* to do? We will review the mistakes that treasurers make and the symptoms. In addition, we'll show how to find the problems and how to correct them. This session serves as an introductory or refresher course for club treasurers and a resource for instructors who know all of the tricks.

4:10 – 5:00 PM

Lakeshore 1

On Becoming a Volunteer
Saul Seinberg

What should you expect from your organization and what should its leadership expect from you? Do you work best in large or small groups, or alone? What type of task (administrative, teaching, etc.) interests you the most? No one approach works best in all organizations, but this session will offer some tips to help both you and the organization make your volunteer effort rewarding and mutually beneficial.

Lakeshore 2

Protect Yourself by Using Good Online Practices
Randy Wilkes

Increase your awareness about the dangers of online computing and learn about good online practices to protect yourself. This session discusses the pitfalls of neglecting to take measures to protect your computer and identity. We cover techniques you can use to decrease spam, talk about spyware and adware, and make suggestions to help protect you from identity theft.

University E

Online Tools for Clubs
Joe Craig & Lynn Ostrem

The Internet changes so quickly, it's hard to keep up. We gain new and exciting web sites every year. Whether you are looking to organize, educate, entertain or communicate, this session has a little something for you! Come hear about online tools—both old and new—that can benefit your club.

5:10 – 6:00 PM

Lakeshore 1

Creating and Running Events
Panel: Ann Cuneaz, Jerry Pillans, Nancy Schrull

How do you find meeting sites for your activities? This discussion examines what you should look for and how to work with and influence the staff of hotels and other venues for major events. We will also discuss ways to recruit sponsors to help subsidize your events.

Lakeshore 2

Sustaining and Maintaining a Strong Organization When Membership is Declining

Panel: Bob Adams, Mary Ann Davis, John Tonsager

What steps can you take to attract new members, and then keep members and clubs actively involved in your organization? See and hear what other organizations are doing to keep communications open and stimulate interest during times of declining membership.

University E

Expert Clubbers Answer Your Questions

Panel: Lynn Ostrem, Louise Sechler, Kathy Tegtmeier

There is no better learning experience for an investment club than listening to a panel discussion by experienced club members. Whether you have questions or concerns of your own, or you are simply interested in hearing (and learning from) other clubs' issues, everyone will leave this session with something new and worthwhile.