

# InvestEd

Investor Education at Its Best™

Charlotte, North Carolina  
August 8-10, 2008

## Newbie Program Schedule and Session Descriptions

### Saturday

**9:15–9:20**    **Welcome—Seymour Zeenkov**

**9:20–10:10**    **Basic Concepts for Investing—  
Louise Sechler**

Newbies can become successful investors by learning the investment principles that have guided successful investors for many years. The session considers an overall strategy for investing and covers the meaning of basic terms used to evaluate a company.

**10:10–10:20**    **Break**

**10:20–11:10**    **Getting Started With  
Judgment—Mary Ann Davis**

The Stock Selection Guide is a tool, and is therefore not the complete answer to the stock study process. To be useful for the investor, the SSG requires the addition of judgment. The session is designed to help new investors develop their judgment skills.

**11:15–12:25**    **Finding Good Candidate  
Companies—Doug Gerlach**

New investors frequently ask, “How do I find good companies to study?” Learn the characteristics of *good* companies and the warning signs of unsuitable investment candidates. In addition, the session explores resources to help identify potentially profitable investments.

**12:30–2:30**    **Lunch**

**2:35–3:00**    **About Mutual Funds—Pam  
Wilkes**

The session takes place in the computer lab and introduces the concept of mutual funds. Topics include Exchange Traded Funds (ETFs) and index funds.

**3:00–3:30**    **Navigating the Software and  
Accessing the Internet—  
Seymour Zeenkov**

Learn how to use computers effectively during a lab session, and become acquainted with stock selection software. The session demonstrates how to access key Internet sites and print selected reports.

**3:30–3:40**    **Break**

**3:40–5:45**    **Computer Lab—Marvin Kohn**

In this hands-on session, Newbies develop their own stock selection analysis and learn to access helpful online sites. Assistance by a lead instructor and experienced tutors ensure that participants fully understand the way that the software works so they are able to use it when they return home.

### Sunday

**9:15–10:25**    **Putting the Pieces Together—  
Kathy Tegmeier**

Now that we’ve learned about the basic stock selection elements and used the stock analysis software, we are ready to look at it as a complete entity. We will discuss the successes and questions from your lab experience. We now have the tools to ask the important question. “What have we learned and how can we use it?”

**10:25–10:35**    **Break**

**10:35–11:25**    **Internet Research Resources—  
John Tonsager**

Downloading data automatically from the Internet to a software analysis program is the first step. Learning the unvarnished truth about a company comes next. We’ll demonstrate how various financial web sites show where to find industry averages and how to compare data with other companies in the same industry.

**11:35–12:15**    **Design and Manage Your Basic  
Portfolio—Seymour Zeenkov**

Learn how to design a basic portfolio based on fundamental investing principles. Find out why diversification decreases risks and how to add diversity to a portfolio. Learn how active portfolio management enhances the prospects of reward and can help preclude unnecessary losses.

**12:15–12:25**    **Conclusion—Seymour Zeenkov**

It’s time to summarize the day-and-a-half Newbie experience and consider the next steps toward investment success. In addition, we’ll review the Sunday afternoon **InvestEd** schedule with an eye toward topics of special interest to new investors.