

InvestEd

Investor Education at Its Best™

Charlotte, North Carolina

August 8-10, 2008

Session Descriptions

Sunday Afternoon, August 10, 2008

2:35 PM – 3:25 PM

University A

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 B

Company Research Using Value Line Reports Ann Cuneaz

Experienced investors consider Value Line research reports an essential component of any stock study, but new investors can find the jam-packed format a bit overwhelming. The session provides a road map to help navigate the Value Line report and pick out key information to assist you in your stock studies. Join the fun and maximize your use of this valuable research tool.

University C

The Inner Geek Lives Joe Craig

Caution! This session has absolutely nothing to do with investing! Computers, the Internet, wireless access, music, video, and telephony are all applications that can run on your computer, your television, your digital video recorder, your video game console, etc. I use this session to show you some fun things that you can do mostly for free, or for a very low cost.

University D

Secrets of Wall Street Analysts Doug Gerlach

How much can you trust Wall Street analysts? Get the inside scoop on what really happens inside investment banks and brokerage firms when they say *buy, sell, or hold*. Also learn the basics of how to build a model to fine-tune your own EPS (earnings per share) projections just like analysts do.

University E

Stock Selection Guide: A Tool to Help Solve the Investment Puzzle Louise Sechler

Puzzled by the Stock Selection Guide? The session dissects and examines all of the pieces of the SSG to help investors understand the significance of each part and

evaluate them. We'll replace the pieces to complete the stock analysis puzzle and learn how to determine if a company is a candidate for a stock portfolio.

Walden

Exploring Exchange Traded Funds (Repeat from Saturday)

Jerry Pillans

Exchange Traded Funds (or ETFs) are open-ended investment funds that can be traded at any time throughout the course of the day. The session covers the basics of ETFs. Topics include how ETFs are created, agents or trustees of ETFs, popular ETFs, and how to include ETFs to round out your portfolio.

3:35 PM – 4:25 PM

University A

SSGs Too Good to Be True

John Tonsager

Learn what to do when the result of a Stock Selection Guide study looks so good that investors question their own judgment. The session removes outliers, makes changes to Toolkit software, and uses the preferred procedure. Learn to curb your optimism and produce a more conservative SSG that is still in the buy range.

University B

Investing 101

Bob Adams

There are four ways to invest in equities: mutual funds, index funds, ETFs (Exchange Traded Funds), and individual brokerage accounts. Learn about the advantages, disadvantages, costs (some are very high), ease of use, and the time required for each type of investment approach. For example, do you understand the real cost of managed mutual funds, and do you compare your portfolio and mutual fund returns with market averages? Learn how easy it is.

University C

Techniques for Managing Email and Simplifying Your Life

Randy Wilkes

Are you fed up with a cluttered inbox? Learn about tools that can help reduce the clutter in your inbox and tame the stress in your life. This session discusses how to create new folders and set up rules to filter your messages. After this session, you will have the tools to take control of your email and manage your life.

University D

Ten Dumbest Mistakes Investors Make (And How You Can Avoid Them)

Doug Gerlach

While it may be impossible to remove human nature and emotion completely from the investment decision-making process, it is possible to understand and control the invisible forces that influence how you invest. Learn to recognize how your fears and misperceptions can lead you down the wrong path, and how following many of Wall Street's maxims cause you to make *dumb* mistakes.

University E

Five Steps to Smarter Investing: Managing Your Portfolio

Irving Roth

Use the ICLUBcentral online and desktop stock screening tools to manage your existing holdings, learn to spot small issues before they become big problems, identify overvalued stocks, and track fundamental changes to your companies.

Walden

Advanced SSG Judgment Decisions (*Repeat from Saturday*)

Brian Altschul

You're comfortable analyzing stocks with the Stock Selection Guide, but how do you move up to a more sophisticated level of analysis? Learn about advanced judgment techniques and *red flags* that can enhance your analysis skills. The session uses the Portfolio Evaluation Review Technique and a variety of data sources to help you make solid decisions on SSG analyses.

4:35 PM – 5:25 PM

University A

Warnings and Red Flags Not on the SSG

Ann Cuneaz

Learn about a number of easy-to-check warning signals and *red flags*—the so-called *other 20%*—that are not evident on the Stock Selection Guide. The session points out useful information in Value Line, on the balance sheet, cash flow statement, annual report, and even in a press release.

University B

Selling Covered Calls

Mary Ann Davis

Selling covered calls is an excellent way to increase the return on your portfolio and insure against a downturn in the market. The session explains the advantages and disadvantages of writing covered calls, how they work, and a step-by-step approach to start using them. Attendees will see actual examples that demonstrate how covered calls work in real life and how they react to the market.

University C

You're Retired, Now What? Tax Efficient Strategies for Surviving Your Retirement

Ira Smilovitz

Today's workers can expect to live nearly as long in retirement as the time they spend in the workforce. The session looks at investment strategies to make your assets last throughout your retirement, as well as tax-efficient plans for drawing on your retirement funds.

University D

Don't Gamble: Invest in the Best Growth Companies

Phil Keating

What kinds of companies would you want at the core of your portfolio if you couldn't sell for five years or more? This session uses the latest investment research of Jeremy Siegel and others to develop several stock screens to identify the most promising candidates for long-term investors to consider. Common outstanding characteristics of great companies are identified and illustrated. Several case studies and examples illustrate the concept of *built to last* companies with high *franchise value*.

University E

Manifest Investing

Mark Robertson

Long-term investing made easier. In this session, we'll take a look at the influence of George Nicholson, David L. Babson, and Benjamin Graham on the web-based tools available at ManifestInvesting.com. The session will review reliable resources used during a stock study, and for effective portfolio design and management.

Walden

Using the Stock Comparison Guide

Marvin Kohn

The Stock Comparison Guide is the next step in the learning process of selecting good securities for your portfolio. This presentation describes how to use SCG software included in Toolkit and Stock Analyst. We evaluate each of the elements of the SCG and try to determine which criteria are most useful in your comparison.