



## CONFERENCE SCHEDULE

Saturday Morning, August 9, 2008

7:00 AM – 9:10 AM Sponsor Breakfast, Corporate Presentations

9:15 AM – 12:25 PM Computer Lab open

University B & C	University D & E	University A	Lakeshore 1	Walden	Harris	Computer Lab
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9:15 AM – 10:05 AM – Concurrent Sessions (50 minutes)

What You Must Know When Buying a Bank Stock  Herb Barnett	Sources of Earnings Growth: Return on Equity and Its Components  Philip J. Keating, CFA	Introduction to Cash Flow Analysis of Stocks  Bart Womack	The Dynamics of SSG Analysis  Brian Altschul	Five Steps to Smarter Investing Using StockCentral Toolkit: Finding Companies  ICLUBcentral Presenter	Registered Newbie Members Only	Open Lab
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10:15 AM – 11:25 AM – Concurrent Sessions (70 minutes)

Small Company Discovery  Mark Robertson	Dividend Paying Stocks  Diane Graese	What Economic Indicators Tell Us about the Stock Market  Bart Womack	Sector and Industry Screening  Saul Seiberg	Five Steps to Smarter Investing Using StockCentral Toolkit: Analyzing a Company  ICLUBcentral Presenter	Registered Newbie Members Only	Open Lab
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11:35 AM – 12:25 PM – Concurrent Sessions (50 minutes)

A Closer Look Using PERT Worksheet-A  Ann Cuneaz	Weeding and Feeding Your Portfolio: Buy or Sell  Philip J. Keating, CFA	Exploring Exchange Traded Funds <i>Repeats Sunday 2:35 PM</i>  Jerry Pillans	SSGs on REITs  Herb Barnett	Which One is for You?: Portfolio Manager or Investment Account Manager  Matt Willms	Registered Newbie Members Only	Open Lab
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12:30 PM – 2:30 PM Sponsor Lunch, Corporate Presentations

# InvestEd

2008 • CHARLOTTE, NC  
Investor Education at Its Best  
August 8–10, 2008

## Saturday Afternoon August 9, 2008

2:35 PM – 6 PM Newbies only in the Computer Lab

University B & C	University D & E	University A	Lakeshore 1	Walden	Harris	Computer Lab
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2:35 PM – 3:25 PM – Concurrent Sessions (50 minutes)

Portfolio-Centered Decision Making	Estimate Future Earnings Using the Preferred Procedure	From the Top Down	Using Options for Conservative Investors	How the Changing Demographics of America Will Influence the Stock Market	Introduction to Diversification and Asset Allocation	Computer Lab Closed
Mark Robertson	Ann Cuneaz	Joe Craig	Saul Seinberg	Bart Womack	Matt Willms	

3:35 PM – 4:25 PM – Concurrent Sessions (50 minutes)

The Fundamentals Always Apply	Beginning Cash Flow Workshop	Advanced SSG Judgment Decisions <i>Repeats Sunday 3:35 PM</i>	The ABCs (and IRS) of Investment Club Withdrawals	Five Steps to Smarter Investing Using StockCentral Toolkit: Comparing Companies	Don't Gamble Away Your 401(k)	Computer Lab Closed
Bob Adams	Diane Graese	Brian Altschul	Ira Smilovitz	ICLUBcentral Presenter	Jerry Pillans	

4:35 PM – 5:45PM – Concurrent Sessions (70 minutes)

Reading Price Charts	Researching Stocks: The Other 20%	Why Social Security Will Change	Mystery SSG Workshop	When Bad Things Happen to Good Stocks	Using Investment Account Manager with Other Software Tools	Computer Lab Closed
Mary Ann Davis	Lynn Ostrem	Bart Womack	Saul Seinberg	Doug Gerlach	Matt Willms	

6:00 PM – 7:00 PM Cash Bar

7:00 PM – 9:30 PM Sponsor Dinner, Corporate Presentations

9:30 PM Cyber Cafe, Computer Lab Open 9:30 PM – Midnight



**Sunday Morning, August 10, 2008**

7:00 AM – 9:15 AM Sponsor Breakfast, Corporate Presentations  
 9:15 AM – 12:25 PM Computer Lab Open

University B & C	University D & E	University A	Lakeshore 1	Walden	Harris	Computer Lab
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**9:15 AM – 10:25 AM – Concurrent Sessions (70 minutes)**

<b>The Curse of Analysis Paralysis</b>	<b>There Is a Time to Buy</b>	<b>StockCentral Unleashed!</b>	<b>You're Retired, Now What? Tax Efficient Strategies for Surviving Your Retirement</b>	<b>SSG Blind Spots</b>	<b>Registered Newbie Members Only</b>	<b>Open Lab</b>
Ann Cuneaz	Mary Ann Davis	Joe Craig	Ira Smilovitz	Mark Robertson		

**10:35 AM – 11:25 AM – Concurrent Sessions (50 minutes)**

<b>Analyzing an Annual Report the Easy Way</b>	<b>Advanced Cash Flow Workshop</b>	<b>Portfolio Management Using PERT Offense and Defense</b>	<b>Asset Allocation</b>	<b>Five Steps to Smarter Investing Using StockCentral Toolkit: Sharing Info</b>	<b>Registered Newbie Members Only</b>	<b>Open Lab</b>
Bob Adams	Diane Graese	Brian Altschul	Saul Seinberg	ICLUBcentral Presenter		

**11:35 AM – 12:25 PM – Concurrent Sessions (50 minutes)**

<b>When to Hire a Financial Planner and How to Find a Good One</b>	<b>Common Mistakes Even Smart Investors Make and How to Avoid Them</b>	<b>Protect Yourself by Using Good Online Practices</b>	<b>Funding Education</b>	<b>Five Steps to Smarter Investing Using StockCentral Toolkit: Managing Your Portfolio</b>	<b>Registered Newbie Members Only</b>	<b>Open Lab</b>
Martha Alderson	Philip J. Keating, CFA	Randy Wilkes	Saul Seinberg	ICLUBcentral Presenter		

12:30 PM – 2:30 PM Sponsor Lunch, Corporate Presentations

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**Sunday Afternoon, August 10, 2008**

2:35 PM – 5:25 PM Computer Lab Open

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**2:35 PM – 3:25 PM – Concurrent Sessions (50 minutes)**

Company Research Using Value Line Reports  Ann Cuneaz	Secrets of Wall Street Analysts  Doug Gerlach	Another Look at StockCentral  Marv Kohn	The Inner Geek Lives  Joe Craig	Stock Selection Guide: A Tool to Help Solve the Investment Puzzle  Louise Sechler	Exploring Exchange Traded Funds <i>Repeat</i>  Jerry Pillans	Open Lab
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**3:35PM – 4:25PM – Concurrent Sessions (50 minutes)**

Investing 101  Bob Adams	Ten Dumbest Mistakes Investors Make (And How You Can Avoid Them)  Doug Gerlach	SSGs Too Good to Be True  John Tonsager	Techniques for Managing Email and Simplifying Your Life  Randy Wilkes	Overview of the New StockCentral Toolkit  ICLUBcentral Presenter	Advanced SSG Judgment Decisions <i>Repeat</i>  Brian Altschul	Open Lab
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**4:35 PM – 5:25 PM – Concurrent Sessions (50 minutes)**

Selling Covered Calls  Mary Ann Davis	Don't Gamble: Invest in the Best Growth Companies  Philip J. Keating, CFA	Warnings and Red Flags <i>Not</i> on the SSG  Ann Cuneaz	Planning for Retirement: How Do I Get There from Here?  Ira Smilovitz	Manifest Investing  Mark Robertson	Using the Stock Comparison Guide  Marv Kohn	Open Lab
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*Travel Home Safely*