

InvestEd

Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Session Descriptions

Saturday Afternoon, August 8, 2009

2:30 PM – 3:40 PM

Bryce

Surviving Bear Markets: Invest in the Best

Phil Keating

Learn to identify the outstanding characteristics of great growth companies: those thriving 10-20 years or longer, including through major bear markets. Identify sources and stock screens for the most promising candidates for long-term investors. Become aware of the findings of past and recent research and the results of very successful long-term investors like Warren Buffett.

Arches

There *IS* a Time to Buy

Mary Ann Davis

Learn how, why, and when to buy stocks based on the Portfolio Review Report and your stock study. Follow these stocks by creating a portfolio in Toolkit and at Yahoo!® Finance. Learn how to place a limit order, compare a stock to the S&P 500 Index performance and to other stocks in the same industry, and obtain a second opinion from the PortfolioGrader Pro.

Sundance – Solitude

Internet Research

Bakul Lalla

If you find the amount of stock research available on the Internet overwhelming, this session is for you! Learn how to keep track of company news, earnings estimates, SEC filings, and fundamentals, as well as how to track a portfolio. Become aware of a variety of websites providing free information needed for your stock studies and portfolio tracking.

Powder Mountain – Snowbird

What Does FINRA Offer?

Lori Schock

FINRA, the Financial Industry Regulatory Authority, is the largest non-governmental regulator for securities firms doing business in the United States. Discover what FINRA

has available in the areas of investor education and protection, market integrity, industry education, and federal securities laws. Learn about trade reporting and other industry utilities, dispute resolution, and free tools and resources.

Brighton – Alta

Investing 101: What Everyone Needs to Know

Bob Adams

Investors may invest in equities through mutual funds, index funds, Exchange-Traded Funds (ETFs), and through individual company stocks. Learn about the advantages, disadvantages, costs, ease of use, and time required for each type of investment approach. This session covers information and guidelines for using credit cards, taking care of your FICO score, and managing your retirement account.

3:50 PM – 5:00 PM

Bryce

Weeding and Feeding Your Portfolio

Phil Keating

Learn to cut the weeds and feed the flowers in your portfolio by combining the principles of good portfolio management with the power of stock study software. Gain knowledge in defining goals, categorizing stock holdings, balancing and diversifying your portfolio, and monitoring and spotlighting issues needing attention. Learn to use the Toolkit 6 Portfolio Offense Report and Challenge Stock features to make sell and replacement decisions.

Arches

Selling Covered Calls

Mary Ann Davis

Selling covered calls is a very conservative strategy that increases the return on your portfolio. This session identifies the basics of options, the advantages and disadvantages of writing covered calls, and how covered calls work. Investors see a step-by-step approach to getting started. Actual examples demonstrate how covered calls work in real life and how they react to the market.

Sundance – Solitude

Introducing Toolkit 6

Susan Maciolek

Since first released in 1994, Toolkit has been the program of choice for many long-term growth investors. Learn what is new in the sixth release of this popular program, and receive an overview of the software's stock analysis and portfolio management features.

Powder Mountain – Snowbird

Secrets of Wall Street Analysts

Doug Gerlach

Can you trust Wall Street analysts? Get the inside scoop about what really happens inside investment banks and brokerage firms when they invite investors to buy, sell, or hold. In addition, learn the basics of building a model to fine tune your own earnings per share (EPS) projections just like analysts do.

Brighton – Alta

Analyzing the Annual Report the Easy Way

Bob Adams

Information in an annual report can be daunting. This session focuses on what sections to read, what is important, what is not important, and how to analyze all the financial numbers. Learn about a free computer tool providing easy and instantaneous analysis to financial data. Recent updates of this tool include the graphing of five years of data and a visual analysis of peer and industry average comparisons.

5:10 PM – 6:00 PM

Bryce

Dynamics of the Stock Selection Form

Brian Altschul

Observe how two club members with differing opinions analyze the same stock and reach different conclusions. This beyond-beginners session demonstrates how to apply judgment decisions and points out useful red flags that help improve stock studies.

Arches

Vetting High and Low Price Using Support and Resistance Levels

Saul Seiberg

This presentation highlights using support and resistance levels as sanity tests for the high and low price selections used in stock studies. The technical analysis terms *support* and *resistance* refer to chart levels depicting share price movement over time. Understanding this visual analysis is as easy as understanding the graph of sales and earnings in your stock study.

Sundance – Solitude

Building and Maintaining a Usable Watch List

Phil Sudore

When hearing a stock tip, do you conduct your own research and stock study to determine if the company is a good quality growth company? Do you keep a watchlist of great companies? This session introduces you to a spreadsheet that tracks all the necessary numbers and provides the formulas needed for a quick reference when you are without your Toolkit software.

Powder Mountain – Snowbird

Managing Risk in a Portfolio

Brad Taylor

Learn how to identify the different types of investment risks and how to manage risk in an investment portfolio. This session explores the effect of portfolio diversification on systematic risk and the amount of diversification investors need in a conservative portfolio.

Brighton – Alta

Conserve Your Stock Selection Form

John Tonsager

Gain knowledge about why to change various settings in Toolkit, and prepare a conservative stock study that lessens risk and increases potential return. In this session, learn to use revenue-based growth rate estimates to establish realistic future growth rates. Improve your knowledge about eliminating outliers and explore ways to create a stock study that results in a more secure portfolio.