

InvestEd

Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Session Descriptions

Sunday Morning, August 9, 2009

9:15 AM – 10:25 AM

Bryce

Advanced Cash Flow Workshop

Diane Graese

This session assumes investors have a working knowledge of cash flow statements. Learn to identify unusual transactions and potential red flags. View and analyze many challenging cash flow statements.

Arches

Sources of Earnings Growth: Return on Equity and Its Components

Phil Keating

Super investor Warren Buffett considers return on equity (ROE) the most important measurement of management's performance. Examining and understanding ROE would have uncovered virtually all of the massive corporate frauds. Using case studies, this session illustrates the components of ROE that drive quality earnings growth and influence price-to-earnings multiples, both of which affect investor returns.

Sundance – Solitude

Growth Investing with a Twist

Lynn Ostrem

Are you interested in expanding your investment resources? The best-selling book, *The Little Book That Makes You Rich* by Louis Navellier, features a proven formula that closely mirrors our own fundamental approach. In addition, it includes a small handful of quantitative tools--the twist! In this session, we review his criteria and learn how to incorporate his strategy into our own style of investing. Then we use real-time examples to get you started with Navellier's free online stock grading tool, PortfolioGrader Pro. Finally! A financial book that you actually can put into practice!

Powder Mountain – Snowbird

Discounted Cash Flow

Bakul Lalla

Learn how the discounted cash flow (DCF) model assists with buy decisions. Gain knowledge about cash flow growth rate assumptions, discount rate, intrinsic value, and

margin of safety. This session includes a case study that demonstrates how a DCF model is constructed and interpreted.

Brighton – Alta

Identifying Excellence in Company Management

Doug Gerlach

What makes a well-managed company different from other companies? What corporate governance practices distinguish a shareholder-focused company? Learn to focus on the key factors that indicate excellence in company management.

10:35 AM – 11:25 AM

Bryce

Playing the Piano with Both Hands #1

Saul Seinberg

This session characterizes and evaluates both fundamental and technical analyses, with a goal of developing and using a blended investment analysis approach. The session segues into a discussion of indicators that gauge investor attitudes toward the market and their use in supplementing a stock study. Other focuses of the session include risk management in evaluating stocks, the role of the price-to-earnings ratio, volume, and volatility in assessing risk.

Arches

Advanced Stock Selection Form Judgment Decisions

Brian Altschul

This session is for investors who are comfortable analyzing stocks. Learn to move to a more sophisticated level of analysis that includes advanced judgment techniques, identification of red flags, and use of quarterly trend analysis. Many examples illustrate the techniques.

Sundance – Solitude

The Inner Geek Builds a Website

Joe Craig

Have you ever wanted to build a website? Have you ever needed to host a website? The “Inner Geek” demonstrates how to create and deploy a basic website. Using free or nearly free resources, investors explore what it takes to create their own websites and transfer them to the Internet. During this session, investors will build a website. Yes, it really is that easy!

Powder Mountain – Snowbird

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

Ira Smilovitz

Your years in retirement may be more than those you spent in the workforce. This 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.

Brighton – Alta

Portfolio Management Using Various Tools

Phil Sudore

Are you suffering from information overload? Do you search for more fundamental portfolio management strategies? Does your mind freeze thinking about spreadsheets for your portfolio? This session explores some easy portfolio management tools related to taxes, diversification, account simplification, and a quick reference on the go.

11:35 AM – 12:25 PM

Bryce

Playing the Piano with Both Hands #2

Saul Seinberg

Part two of playing the piano examines how a dual analytical investing approach that uses features of both fundamental and technical analyses leads to better overall investment decisions. This session focuses on relative strength, an indicator that may show the reliability of the recent past performance of a stock. In addition, you take a real-time trip to StockCharts.com, an Internet charting service. See relative strength in action, and learn to apply it to amplify your stock studies.

Arches

Dividend Paying Stocks

Diane Graese

Dividends provide a relatively secure source of return and help to stabilize and diversify a portfolio. Learn how to find the best dividend paying stocks and how to analyze them before investing in a company.

Sundance – Solitude

Go Offense! Go Defense! When to Buy, Sell, or Hold with Toolkit 6

Doug Gerlach

Toolkit 6 features powerful tools and reports for portfolio management. Learn how to interpret and act on the offensive and defensive alerts generated by the software and where to discover information about a company's current condition. Develop a strategy for continuously upgrading the quality of your portfolio through use of the Challenge Stock function in the software.

Powder Mountain – Snowbird

Screening for Mutual Funds

Jerry Pillans

Are you looking for the right mutual fund for your portfolio? Make an informed decision by using online screening tools to select the best funds. This session incorporates a comparison of websites including Morningstar®, SmartMoney, MSN Money, and Kiplinger. These sites offer the investor the opportunity to screen for important aspects of mutual funds, such as expenses, turnover, return, and management tenure.

Brighton – Alta

Tracking Covered Calls Using Investment Account Manager

Matt Willms

Gain knowledge about the process of tracking covered calls in an investment portfolio. Writing covered calls is a proven strategy for generating investment income and helping reduce concentrated positions in a portfolio. This session uses Investment Account Manager (IAM) to illustrate the strategy and to demonstrate how to handle the possible option outcomes required for accurate IRS tax filing.