



Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

CONFERENCE SCHEDULE

Saturday, August 8, 2009

Morning Schedule

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

9:15 AM – 12:25 PM Computer Lab open

Bryce	Arches	Sundance - Solitude	Powder Mountain – Snowbird	Brighton - Alta	Big Cottonwood	Deer Valley
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9:15 AM – 10:25 AM – Concurrent Sessions (70 minutes)

There <i>IS</i> a Time to Sell	The History and Future of the Market, Internet and Software	Stock Up: Veterans Share Their Secrets	FINRA's ETF and Mutual Fund Screener	Toolkit 6 and StockCentral: A Great Combination	Registered Newbie Members Only	Open Lab
Mary Ann Davis	Bob Adams	Brian Altschul, Bakul Lalla, Saul Seinerberg	Lori Schock	Susan Maciolek		
Intermediate	Basic New!	General New!	General New!	General New!		

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

Beginning Cash Flow Workshop	Evaluate Management: Dissecting Pre-Tax Profit	Become an Investing Star: Using Morningstar's Reports and Website	Building an ETF Portfolio	Introduction to Investment Account Manager	Registered Newbie Members Only	Open Lab
Diane Graese	John Diercks	Shanna Rendon	Jerry Pillans	Matt Willms		
Basic	Intermediate	Intermediate New!	Basic New!	General New!		

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

Your Portfolio: How Ya Doin'?	Evaluate Management: Understanding Return on Equity	The Impact of Recent and Upcoming Tax Law Changes	Investing During Turbulent Times	Introducing StockCentral	Registered Newbie Members Only	Open Lab
Bob Adams	John Diercks	Ira Smilovitz	Lori Schock	Joe Craig		
Basic New!	Intermediate	General New!	General New!	Basic		

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



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Saturday, August 8, 2009 Afternoon Schedule

2:30PM – 6:00 PM Newbies only in the Computer Lab

Bryce	Arches	Sundance - Solitude	Powder Mountain – Snowbird	Brighton - Alta	Big Cottonwood	Deer Valley
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2:30 PM – 3:40 PM – Concurrent Sessions (70 minutes)

Surviving Bear Markets: Invest in the Best	There <i>IS</i> a Time to Buy	Internet Research	What Does FINRA Offer?	Investing 101: What Everyone Needs to Know		Computer Lab Closed
Phil Keating	Mary Ann Davis	Bakul Lalla	Lori Schock	Bob Adams		
General	Intermediate	Intermediate New!	General New!	Basic New!		

3:50 PM – 5:00 PM – Concurrent Sessions (70 minutes)

Weeding & Feeding Your Portfolio: When to Buy or Sell	Selling Covered Calls	Introducing Toolkit 6	Secrets of Wall Street Analysts	Analyzing the Annual Report the Easy Way		Computer Lab Closed
Phil Keating	Mary Ann Davis	Susan Maciolek	Doug Gerlach	Bob Adams		
Basic	General	General New!	General	Basic		

5:10 PM – 6:00 PM – Concurrent Sessions (50 minutes)

Dynamics of the Stock Selection Form	Vetting High and Low Price Using Support & Resistance Levels	Building and Maintaining a Usable Watchlist	Managing Risk in a Portfolio	Conserve Your Stock Selection Form		Computer Lab Closed
Brian Altschul	Saul Seinerberg	Phil Sudore	Brad Taylor	John Tonsager		
Intermediate	Intermediate New!	Intermediate New!	Basic New!	Intermediate New!		

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



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Sunday, August 9, 2009 Morning Schedule

7:00 AM – 9:15 AM Sponsor Breakfast, Corporate Presentations

9:15 AM – 12:25 PM Computer Lab Open

Bryce	Arches	Sundance - Solitude	Powder Mountain – Snowbird	Brighton - Alta	Big Cottonwood	Deer Valley
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9:15 AM – 10:25 AM – Concurrent Sessions (70 minutes)

Advanced Cash Flow Workshop	Sources of Earnings Growth: Return on Equity and Its Components	Growth Investing With a Twist	Discounted Cash Flow	Identifying Excellence in Company Management	Registered Newbie Members Only	Open Lab
Diane Graese Advanced	Phil Keating Intermediate	Lynn Ostrem General New!	Bakul Lalla Advanced	Doug Gerlach Intermediate		

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

Playing the Piano With Both Hands #1	Advanced Stock Selection Form Judgment Decisions	The Inner Geek Builds a Website	You're Retired, Now What? Tax Efficient Strategies for Surviving Your Retirement	Portfolio Management Using Various Tools	Registered Newbie Members Only	Open Lab
Saul Seinerberg Intermediate New!	Brian Altschul Advanced	Joe Craig Intermediate New!	Ira Smilovitz General	Phil Sudore Intermediate New!		

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

Playing the Piano With Both Hands #2	Dividend Paying Stocks	Go Offense! Go Defense! When to Buy, Sell, or Hold with Toolkit 6	Screening for Mutual Funds	Tracking Covered Calls Using Investment Account Manager	Registered Newbie Members Only	Open Lab
Saul Seinerberg Intermediate New!	Diane Graese Basic	Doug Gerlach Intermediate	Jerry Pillans Basic New!	Matt Willms Intermediate New!		

12:30 PM – 2:50 PM Sponsor Lunch, Corporate Presentations



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Sunday, August 9, 2009

Afternoon Schedule

3:00 PM – 5:10 PM Computer Lab Open

Bryce	Arches	Sundance - Solitude	Powder Mountain – Snowbird	Brighton - Alta	Big Cottonwood	Deer Valley
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3:00 PM – 4:10 PM – Concurrent Sessions (70 minutes)

<p>Lessons from Behavioral Finance: Avoiding Mistakes Even Smart Investors Make</p> <p>Phil Keating</p> <p>General</p>	<p>Price Chart Reading</p> <p>Mary Ann Davis</p> <p>Intermediate</p>	<p>Portfolio Management Using Quarterly Trend Analysis</p> <p>Brian Altschul</p> <p>Intermediate New!</p>	<p>Searching for Gems</p> <p>Bob Adams, Lynn Ostrem, John Tonsager</p> <p>General New!</p>	<p>Toolkit 6 and StockCentral: A Great Combination</p> <p><i>Repeat from Saturday morning</i></p> <p>Susan Maciolek</p> <p>General New!</p>	<p>Stock Analysis Using the Stock Investment Guide Software</p> <p>Brad Taylor</p> <p>Basic New!</p>	<p>Open Lab</p>
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4:20 PM – 5:10 PM - Concurrent Sessions (50 minutes)

<p>Armchair Quarterbacking Your Portfolio</p> <p>Matt Willms</p> <p>Advanced</p>	<p>Keeping Up with StockCentral</p> <p>Joe Craig</p> <p>Basic</p>	<p>New to Toolkit 6? This Session is for You</p> <p>Shanna Rendon</p> <p>Basic New!</p>	<p>Planning for Retirement: How Do I Get There from Here?</p> <p>Ira Smilovitz</p> <p>General</p>	<p>Storing and Protecting Your Valuable Records BEFORE a Disaster Strikes</p> <p>Pam Wilkes</p> <p>General New!</p>	<p>Using Good Online Practices</p> <p>Randy Wilkes</p> <p>Basic</p>	<p>Open Lab</p>
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Travel Home Safely