



Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Leadership Training Session Descriptions

Friday Afternoon, August 7, 2009

12:00 PM – 12:15 PM

Introductions and Opening Remarks *Bryce*

12:25 PM – 1:15 PM

Brighton – Alta

Building a Super Presentation

Mary Ann Davis

This session is all about tried and tested topics, ideas, and techniques for your presentations. Effective presentation examples demonstrate key points. This session includes getting started, finding ideas, locating information sources, selecting appropriate media, using and improving screen captures, building interest, and teaching multiple levels of investors at the same time.

Powder Mountain – Snowbird

Model Club Meeting

Lynn Ostrem & Friends

Are you new to investing or simply tired of going it alone? Join us for an investment club meeting. Hear club reports, a new stock presentation, a review of the club portfolio, and a discussion that results in a vote to buy or sell stocks. This is as real as it gets! Come see if it is for you.

1:30 PM – 2:20 PM

Brighton – Alta

Present Like a Pro

Saul Seiberg

Presenters usually focus on content when preparing and delivering a presentation. However, statistical studies indicate that how you present, more than what you say, resonates with an audience. Learn the best practices and the negative factors to avoid in delivering stellar presentations.

Powder Mountain – Snowbird

Enhancing Club Member Participation

Diane Graese

This session provides ideas about how to increase participation among your investment club members. Help members overcome the fear factor, and make their participation easy and comfortable. Included in this session is a discussion of new ideas to make club meetings educational and fun.

2:35 PM – 3:45 PM

Brighton – Alta

Screen Shot Software

Kathy Tegtmeier

This session demonstrates how to use screen shot software to create highly effective documents by including images in your PowerPoint presentations, newsletters, and organization communications. View screen shot Input images from stock analysis software and web pages, edit them, and then place the Output images into presentations and communications. In addition, explore the many Output formats available, and gain insight into the why, where, and how of storing the images.

Powder Mountain – Snowbird

Jazzing UP Your Club Meetings

Lynn Ostrem

All work and no play causes even the most successful club to become restless and bored. Jazz up your meetings with new ideas for format changes, field trips, education, and more. This fast-paced session includes investor participation and a resource handout chock full of games, puzzles, quizzes, and contests. Play Money Tunes, Portfolio Pictionary, and Match-It-Up for door prizes. Prepare to be jazzed!

4:00 PM – 4:50 PM

Brighton – Alta

Using Microsoft Excel 2007

Phil Sudore

This is the session for investors who have an interest in or are just starting to use spreadsheets, as well as for advanced users who can bring a tip or two for fellow investors. Microsoft Excel is an extremely useful tool in managing a club portfolio, stock watch lists, address and phone contact information, event administration, organizational interest forms, and training evaluation forms. Learn about Excel features and tips and the differences between versions of this software.

Powder Mountain – Snowbird

How to Host an Online Meeting or Class

Joe Craig

See an online meeting in action, and learn how to use the free and low-cost meeting tools available. The session explores a variety of websites useful in hosting a meeting, teaching a class, making a long-distance visit to a club, or using free conference calling services. Included are sources for holding a meeting without the need of a computer screen. In addition, the session includes how to add interactive features to a club or organization website or to an online seminar room.

5:05 PM – 5:55 PM

Brighton – Alta

Managing Your Online Life

Randy Wilkes

Have you ever lost an email message? Have you ever seen a great website, but cannot find it when you need it? Do you have multiple computers and find what you need always is on the other one? Do you remember all of your passwords? Learn to manage your email, your web bookmarks and your passwords so that they are available to you when you need them and available on any computer you are using.

Powder Mountain – Snowbird

Recruiting and Mentoring for Clubs

Lynn Ostrem

All clubs wrestle with the issues of recruiting and training new members. In this session you hear the five best places to find new prospects and receive a compatibility check list and other materials to help you recruit those most likely to succeed. Then, learn how to create a mentoring program, complete with ideas, resources and practical advice gathered from those who sought and found solutions.