

InvestEd

Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Session Descriptions August 8–9, 2009

Saturday Morning, August 8, 2009

9:15 AM – 10:25 AM

Bryce

There *IS* a Time to Sell

Mary Ann Davis

This session turns the clock back to the year 2000 and shows examples of stocks that should have been sold based on the Stock Management Guide and Quarterly Trend Analysis indicators. Price charts are used to show price performance and how it can be used to confirm the recommendations given by Toolkit 6 reports.

Arches

The History and Future of the Market, Internet, and Software

Bob Adams

History is an excellent teacher. Looking back at the source of the investment theory followed by long-term investors can strengthen present and future resolve. Learn to apply today's technology to George Nicholson's teachings related to stock portfolio planning for the long term.

Sundance – Solitude

Stock Up: Veterans Share Their Secrets

Brian Altschul, Bakul Lalla, Saul Seinberg

Panelists discuss the merits of potential investment candidate companies, focusing on techniques they employ to differentiate suitable companies from those likely to result in a poor investment. They describe the best way to perform stock studies, given the less than impressive performance results common to the current economic malaise.

Powder Mountain – Snowbird

FINRA's ETF and Mutual Fund Screener

Lori Schock

Costs take a toll on the value of your investments. With the Financial Industry Regulatory Authority (FINRA) Fund Analyzer, investors perform their own research on

the costs of mutual funds, Exchange-Traded Funds (ETFs), and Exchange-Traded Notes (ETNs). Learn how to search, analyze, and compare these investment vehicles.

Brighton – Alta

Toolkit 6 and StockCentral: A Great Combination

Susan Maciolek

Toolkit 6 includes many innovative features that utilize the data and tools available at StockCentral.com. Learn how to access the Complete Roster of Quality Companies, and learn the ins and outs of using Morningstar® company data files. Gain knowledge about how to interpret the Take Stock Quality Index and how to access StockCentral's research links. Learn how to download screener results directly into Toolkit.

10:35 AM – 11:25 AM

Bryce

Beginning Cash Flow Workshop

Diane Graese

Cash flow statements provide a comprehensive picture of a company's fiscal operations. In this session, investors learn cash flow concepts and analyze a cash flow statement through a hands-on exercise. Come away from this session compelled to use this critical section of the financial statement before making any investment decisions.

Arches

Evaluate Management: Dissecting Pre-Tax Profit

John Diercks

Does company management perform in the best interests of shareholders in this time of financial upheaval? This session focuses on the relationship of sales and expenses to the pre-tax profit margin. Learn to recognize developing problems in pre-tax margins by studying trends of this important financial ratio.

Sundance – Solitude

Become an Investing Star: Using Morningstar's® Reports and Website

Shanna Rendon

The Morningstar® website contains valuable information to help investors enhance their stock studies, including free and premium stock reports. Learn about the criteria Morningstar analysts use to determine a five-star stock rating. Is it the safety margin, the competitive advantage, or fair value? The information in this session helps investors augment their stock analysis.

Powder Mountain – Snowbird

Building an ETF Portfolio

Jerry Pillans

Learn to build an Exchange-Traded Fund (ETF) portfolio using index-based ETFs and sector-based ETFs. Exchange-Traded Funds are open-ended funds that trade like an

individual stock, but have the valuation and diversification features of a mutual fund. This session includes managing an ETF portfolio using Investment Account Manager.

Brighton – Alta

Introduction to Investment Account Manager

Matt Willms

Designed by professional money managers and used by investors worldwide, the Investment Account Manager (IAM) helps both novice and seasoned investors better understand and manage investment portfolios. This session demonstrates this easy-to-learn tool through creating portfolios, entering transactions, importing StockCentral data, and reviewing reporting and graphing features.

11:35 AM – 12:25 PM

Bryce

Your Portfolio: How Ya Doin?

Bob Adams

Do you know how your portfolio is performing? If not, your financial future may be in jeopardy! Knowing your portfolio's growth percentage and being able to compare it to the market's growth is imperative. Become a smarter investor by learning where to find the necessary data and how to make easy comparisons to market averages. Being aware of your portfolio's comparative performance helps you take vitally important action.

Arches

Evaluate Management: Understanding Return on Equity

John Diercks

Learn to investigate whether or not management is acting in the best interests of shareholders, especially in turbulent times. Return on equity (ROE) encompasses three basic components that help investors understand if a company is using shareholder equity wisely. Investors learn to recognize developing ROE trend-related problems in this important financial ratio.

Sundance – Solitude

The Impact of Recent and Upcoming Tax Law Changes

Ira Smilovitz

More and more tax laws come into play each year. EGTRRA, JCWA, JGTRRA, WFTRA, AJCA, TIPRA, PPA, TIPA, ESA, EESA, and ARRA are just a few of the tax laws enacted in the past decade. Help in ferreting out the important information is on the way. Forget the alphabet soup! Learn the ins and outs of recent and upcoming tax law changes and their meaning for investors.

Powder Mountain – Snowbird

Investing During Turbulent Times

Lori Schock

A popular saying indicates that “prosperity is a great teacher, but adversity is a better one.” Periods of great adversity define the market, from the Panic of 1907 to the crash of 1929 to the bursting of the technology bubble in 2000. This session explores the question: What will adversity teach us this time?

Brighton – Alta

Introducing StockCentral

Joe Craig

StockCentral.com is a unique website for fundamental investors. This session introduces investors to the website’s tools for screening, stock selection, annual report analysis, and other special features. A key trait of the website is the community of investors where StockCentral users learn to leverage the knowledge of others to improve investment decisions and discover other hidden gems on the website.