

InvestEd

Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Session Descriptions August 8–9, 2009

Sunday Afternoon, August 9, 2009

3:00 PM – 4:10 PM

Bryce

Lessons from Behavioral Finance: Avoiding Mistakes Even Smart Investors Make

Phil Keating

All investors make common decision-making mistakes that prevent them from reaching their investment goals. Modern behavioral finance highlights cognitive, perceptual, emotional, and social factors that cause many investors to buy high and sell low. These irrational behaviors provide opportunities for disciplined investors to profit handsomely. This session offers several examples and company case studies illustrating these behaviors and examining how to overcome them.

Arches

Price Chart Reading

Mary Ann Davis

Designed for the long-term investor, this session introduces price charts and explains how to read them. Topics include moving averages, support and resistance, trend lines, and crossovers. Investors can use these signals as exit and entry points. Expanding your knowledge of charts is very helpful for the sessions of *There IS a Time to Buy* and *There IS a Time to Sell*.

Sundance – Solitude

Portfolio Management Using Quarterly Trend Analysis

Brian Altschul

You use a stock study form to make your investment decisions. The next step is portfolio management. Features in the new Toolkit 6 software assist you in maintaining a healthier portfolio. The tools explored in this session include Portfolio Review, Trend Report, and Stock Management Guide. This session concentrates on using quarterly trends to analyze real life examples. Learn how to detect these trends before the market does.

Powder Mountain – Snowbird

Searching for Gems

Bob Adams, Lynn Ostrem, John Tonsager

Finding a great stock to study is like looking for gems. Not every shiny stone turns out to be a jewel. This panel of experienced investors will share the websites and processes they use to find only the best.

Brighton – Alta

Toolkit 6 and StockCentral: A Great Combination *(Repeat from Saturday)*

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.

Big Cottonwood

Stock Analysis Using the Stock Investment Guide Software

Brad Taylor

Whether you use a MAC or PC, learn to perform stock studies using the Stock Investment Guide (SIG) software and the data services of either StockCentral or BetterInvesting. Complete stock studies using SIG and share data files with other investors using different stock study software.

4:20 PM – 5:10 PM

Bryce

Armchair Quarterbacking Your Portfolio

Matt Willms

Are you as good at managing your portfolios as a general manager is at managing a sports team? Dividing your portfolio into groups or squads of all-stars, core starters, and those on the injured or reserve list accomplishes the task of managing your holdings more easily. This session highlights identifying the characteristics of these three groups and using Investment Account Manager (IAM) and Toolkit 6 software to identify when players need repositioning.

Arches

Keeping Up with StockCentral

Joe Craig

StockCentral.com, a one-stop website for fundamental investors, is an ever-changing source of information and data. This session focuses on new options at StockCentral, including new tools and community features. Learn how to use the StockCentral tools to enhance your stock selections and help with other investing decisions. We review the resources available to the StockCentral community of investors.

Sundance – Solitude

New to Toolkit 6? This Session is for You

Shanna Rendon

Do you need more help adding judgments to your stock study? This session demonstrates features in Toolkit 6 and at StockCentral.com that make adding judgments easier. This is a follow-up session for Newbie Program participants and for all investors who need beginning help with Toolkit 6.

Powder Mountain – Snowbird

Planning for Retirement: How Do I Get There from Here?

Ira Smilovitz

For many people the era of employment with one company during a working career and retirement with a defined benefit pension is over. Individuals need to take an active role in planning for retirement. Learn how to identify and prioritize your retirement funding options.

Brighton – Alta

Storing and Protecting Your Valuable Records BEFORE a Disaster Strikes

Pam Wilkes

You may have been lucky enough thus far to have avoided a burglary, a natural disaster, a computer failure, or misplacing important documents. Are you prepared if something disastrous happens? Maintaining records to ensure you have current and complete documentation stored safely requires a commitment. Learn how to keep your information available and secure in a single well-organized record keeping system.

Big Cottonwood

Using Good Online Practices

Randy Wilkes

Increase your awareness about the dangers of online computing. To protect yourself, learn about and use good online practices. This session focuses on the pitfalls of neglecting to take measures to protect your computer and your identity. Gain knowledge about techniques to decrease spam. Become aware of important information about spyware and adware. Explore suggestions helpful in protecting you from identity theft.