

InvestEd

Investor Education at Its Best™

Salt Lake City, Utah

August 7 – 9, 2009

Newbie Program Schedule and Session Descriptions

Saturday

9:15 – 9:20 Welcome
Seymour Zeenkov

9:20 – 10:25 Basic Concepts for Investing
Louise Sechler

Newbies become successful investors by learning the investment principles that guide successful investors. This session considers an overall strategy for investing and covers the meaning of basic terms used to evaluate a company. Learn the concepts of investing that have worked for many years.

10:35 - 11:25 Finding Good Candidate Companies
Doug Gerlach

New investors frequently ask, "How do I find good companies to study?" Learn the characteristics of quality companies and the warning signs of unsuitable investment candidates. Explore resources to help identify potentially profitable investments.

11:35 - 12:25 There are Mutual Funds Too
Pam Wilkes

Although InvestEd focuses on the evaluation of individual company stocks, mutual funds also are a significant part of the market. Mutual funds provide another means of investing. Learn about the advantages and cautions of fund investing. The discussion considers the various types of funds, including index funds and Exchange-Traded Funds (ETFs).

12:30 - 2:30 Lunch

2:30 - 3:10 Embracing the Fundamentals of Stock Selection
Seymour Zeenkov

This session takes place in the computer lab. We discuss the basic characteristics and ground rules used in fundamental investing analysis. Before hands-on activities, investors receive an introduction to and definition of unique terms that are key elements of stock studies. Identified and explained simple ground rules facilitate successful stock studies.

3:10 - 6:00 Hands-on Stock Selection – with Your Hands!
Kathy Tegtmeier

In this hands-on session, Newbies use stock analysis software to look for good quality companies selling at reasonable prices. They participate in a step-by-step process through each section of the stock study analysis, applying the necessary judgments and evaluating results. A corps of tutors provides "over the shoulder" help to ensure each Newbie understands the process. Following a group stock evaluation, these new investors have time to explore the worthiness of several companies of their choice.

Sunday

9:15 - 10:25 Judgment with Confidence
Mary Ann Davis

The stock study software provides a most efficient process for evaluating the suitability of a company's stock, but its value to the investor depends on the quality of judgments applied. This session builds on your hands-on experience yesterday afternoon and adds to your confidence in developing judgment skills.

10:35 - 11:25 Internet Research Resources
John Tonsager

Downloading data automatically from the Internet into your software analysis program is the first step. Learning the unvarnished truth about a company comes next. This session directs Newbies to financial websites showing industry averages and allowing the investor to compare data with other companies in the same industry.

11:35 - 12:25 Develop and Manage Your Portfolio
Seymour Zeenkov

Learn to design a portfolio based on fundamental investing principles. Gain insights about why diversification decreases risks and how to add diversity to your portfolio. Become acquainted with how active portfolio management enhances the prospects of reward and helps preclude unnecessary losses.