InvestEd

Investor Education at Its Best™

Charlotte, North Carolina

August 8-10, 2008

Session Descriptions

Saturday Morning, August 9, 2008

9:15 AM – 10:05 AM

University A

Introduction to Cash Flow Analysis of Stocks
Bart Womack
The session explores the contribution of cash flow analysis to proper stock selection. Attendees learn how to perform interpretations of the statement of cash flow and how to use the interpretations in conjunction with the balance sheet and income statement in stock selection. Ultimately, we'll generate a check list to evaluate stocks that investors already own as well as those they intend to purchase in the future.

University B

What You Must Know When Buying a Bank Stock
Herb Barnett
If you've ever tried to prepare a Stock Selection Guide on a bank stock, you know the metrics that apply to *normal* companies don't apply to banks. This session explores the numbers that do apply to banks, what they mean, and how to make informed decisions about investing in bank stocks.

University C

The Dynamics of SSG Analysis
Brian Altschul
Observe how two club members with differing opinions use the Stock Selection Guide to analyze the same stock and reach their conclusions. This *beyond beginners* session demonstrates how to apply judgment decisions and points out some useful *red flags* that may help to improve your SSG analyses.

University D

Sources of Earnings Growth: Return on Equity and Its Components
Phil Keating
Warren Buffett considers return on equity the most important measurement of management's performance. Understanding ROE would have uncovered virtually all of the massive corporate frauds from Enron to WorldCom and the bubble stocks from Cisco to Tyco. Using case studies, the session discusses the components of ROE that drive quality earnings growth, influence P/E multiples (price/earnings ratios), and investor returns. They are asset turnover, profit margins, financial leverage, tax rates, and dividend policy.

University E

Overview of the ICLUBcentral Investment Tools
Daniel Abraham

The ICLUBcentral investment tools offer a variety of online and desktop software programs for analyzing a stock. Learn how to pick the best tools to complement your personal approach and skill level.

10:15 AM – 11:25 AM

University A

What Economic Indicators Tell Us about the Stock Market
Bart Womack
This session looks at 10 important economic indicators. Attendees will determine what effect those indicators have on the economy as well as their inevitable impact on the stock market. Understanding how these indicators affect the success of investors' portfolios will be a central goal.

University B

Small Company Discovery
Mark Robertson
Why are small companies important to our portfolios? Is it really possible to select smaller companies without greater risk? This session makes the case to shop for small companies and the positive impact that small companies can have on our portfolios. It includes favorite resources for small company ideas.

University C

Sector and Industry Screening
Saul Seinberg
Is your portfolio missing representation in one or more sectors that are attractive to you or your club? What's the best and most efficient way to find suitable investment candidates that are worth the time to evaluate them? Starting with definitions of sectors and industries, this session shows how to find such candidate stocks in sectors or industries of interest and what to do after you identify them.

University D

Dividend Paying Stocks
Diane Graese
Dividends provide a fairly secure source of return and can help to stabilize and diversify your portfolio. Learn how to find the best dividend paying stocks and analyze them before investing. The session includes numerous examples.

University E

Five Steps to Smarter Investing: Finding Companies
Irving Roth
Use the ICLUBcentral online and desktop stock screening tools to search for stocks that meet your criteria and to find quality growth stock candidates. Learn how to build and save your personal search criteria so that you will always have a collection of potentially hot stocks at your fingertips, just a point and click away.

11:35 AM – 12:25 PM

University A

Exploring Exchange Traded Funds *(Repeats Sunday 2:35 PM)*
Jerry Pillans

Exchange Traded Funds (or ETFs) are open-ended investment funds that can be traded at any time throughout the course of the day. The session covers the basics of ETFs. Topics include: how ETFs are created, agents or trustees of ETFs, popular ETFs, and how to include ETFs to round out your portfolio.

University B

A Closer Look Using PERT Worksheet-A
Ann Cuneaz
Like the Stock Selection Guide, the Portfolio Evaluation Review Technique Worksheet-A is a tool that helps spot trends in a company's fundamental performance. Learn how to use and interpret the PERT-A to help you make better buy and sell decisions.

University C

SSGs on REITs
Herb Barnett
A Real Estate Investment Trust is a real estate company that offers common shares to the public. REITs present industry-specific issues related to understanding the unique industry model, the data to use, and the availability of data. This session examines the issues to help investors understand REITs and make informed investment decisions.

University D

Weeding and Feeding Your Portfolio: Buy or Sell
Phil Keating
Learn to cut the *weeds* and feed the *flowers* in your portfolio by applying the principles of good portfolio management, including prudent diversification. Investor's Toolkit has many reports that categorize stock holdings, spotlight issues that need attention, and rank holdings on key fundamental factors. Learn why and when to sell and how to use the Toolkit *challenge* feature to find the best candidates as replacements. The session includes sample portfolios with examples and case studies.

University E

Which One Is for You?: Portfolio Manager or Investment Account Manager
Matt Willms
This session compares Portfolio Manager and Investment Account Manager, both QUANT IX SOFTWARE products. Professional money managers designed both of these programs in order to help investors better understand and manage their investment portfolios. The session introduces the features of both programs and highlights the differences in order to help you identify which program best fits your needs. Topics include: creating portfolios, entering investment transactions, and reviewing reporting and graphing tools.