

InvestEd

Investor Education at Its Best™

Charlotte, North Carolina

August 8-10, 2008

CONFERENCE SCHEDULE

Saturday Morning, August 9, 2008

7:00 AM – 9:10 AM Sponsor Breakfast, Corporate Presentations

9:15 AM – 12:25 PM Computer Lab open

University A	University B	University C	University D	University E	Walden	Glenwaters
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9:15 AM – 10:05 AM – Concurrent Sessions (50 minutes)

Introduction to Cash Flow Analysis of Stocks Bart Womack	What You Must Know When Buying a Bank Stock Herb Barnett	The Dynamics of SSG Analysis Brian Altschul	Sources of Earnings Growth: Return on Equity and Its Components Philip J. Keating, CFA	Overview of the ICLUBcentral Investment Tools Daniel Abraham	Registered Newbie Members Only	Open Lab
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10:15 AM – 11:25 AM – Concurrent Sessions (70 minutes)

What Economic Indicators Tell Us about the Stock Market Bart Womack	Small Company Discovery Mark Robertson	Sector and Industry Screening Saul Seinberg	Dividend Paying Stocks Diane Graese	Five Steps to Smarter Investing: Finding Companies Irving Roth	Registered Newbie Members Only	Open Lab
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11:35 AM – 12:25 PM – Concurrent Sessions (50 minutes)

Exploring Exchange Traded Funds <i>Repeats Sunday 2:35 PM</i> Jerry Pillans	A Closer Look Using PERT Worksheet-A Ann Cuneaz	SSGs on REITs Herb Barnett	Weeding and Feeding Your Portfolio: Buy or Sell Philip J. Keating, CFA	Which One is for You?: Portfolio Manager or Investment Account Manager Matt Willms	Registered Newbie Members Only	Open Lab
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12:30 PM – 2:30 PM Sponsor Lunch, Corporate Presentations

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Saturday Afternoon August 9, 2008

2:35 PM – 6 PM Newbies only in the Computer Lab

University A	University B	University C	University D	University E	Walden	Glenwaters
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2:35 PM – 3:25 PM – Concurrent Sessions (50 minutes)

Introduction to Diversification and Asset Allocation	Portfolio-Centered Decision Making	Using Options for Conservative Investors	Estimate Future Earnings Using the Preferred Procedure	How the Changing Demographics of America Will Influence the Stock Market	From the Top Down	Computer Lab Closed
Matt Willms	Mark Robertson	Saul Seinberg	Ann Cuneaz	Bart Womack	Joe Craig	

3:35 PM – 4:25 PM – Concurrent Sessions (50 minutes)

Advanced SSG Judgment Decisions <i>Repeats Sunday 3:35 PM</i>	The Fundamentals Always Apply	The ABCs (and IRS) of Investment Club Withdrawals	Beginning Cash Flow Workshop	Five Steps to Smarter Investing: Analyzing a Company	Don't Gamble Away Your 401(k)	Computer Lab Closed
Brian Altschul	Bob Adams	Ira Smilovitz	Diane Graese	Irving Roth	Jerry Pillans	

4:35 PM – 5:45PM – Concurrent Sessions (70 minutes)

Why Social Security Will Change	Reading Price Charts	Mystery SSG Workshop	Researching Stocks: The Other 20%	When Bad Things Happen to Good Stocks	Using Investment Account Manager with Other Software Tools	Computer Lab Closed
Bart Womack	Mary Ann Davis	Saul Seinberg	Lynn Ostrem	Doug Gerlach	Matt Willms	

6:00 PM – 7:00 PM Cash Bar

7:00 PM – 9:30 PM Sponsor Dinner, Corporate Presentations

9:30 PM Cyber Cafe, Computer Lab Open 9:30 PM – Midnight

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Sunday Morning, August 10, 2008

7:00 AM – 9:15 AM Sponsor Breakfast, Corporate Presentations

9:15 AM – 12:25 PM Computer Lab Open

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9:15 AM – 10:25 AM – Concurrent Sessions (70 minutes)

StockCentral Unleashed!	The Curse of Analysis Paralysis	Planning for Retirement: How Do I Get There from Here?	There Is a Time to Buy	SSG Blind Spots	Registered Newbie Members Only	Open Lab
Joe Craig	Ann Cuneaz	Ira Smilovitz	Mary Ann Davis	Mark Robertson		

10:35 AM – 11:25 AM – Concurrent Sessions (50 minutes)

Portfolio Management Using PERT Offense and Defense	Analyzing an Annual Report the Easy Way	Asset Allocation	Advanced Cash Flow Workshop	Five Steps to Smarter Investing: Comparing Companies	Registered Newbie Members Only	Open Lab
Brian Altschul	Bob Adams	Saul Seinberg	Diane Graese	Doug Gerlach		

11:35 AM – 12:25 PM – Concurrent Sessions (50 minutes)

Speculation in Investment Portfolios	When to Hire a Financial Planner and How to Find a Good One	Funding Education	Common Mistakes Even Smart Investors Make and How to Avoid Them	Five Steps to Smarter Investing: Sharing Information	Registered Newbie Members Only	Open Lab
Brad Taylor	Martha Alderson	Saul Seinberg	Philip J. Keating, CFA	Daniel Abraham		

12:30 PM – 2:30 PM Sponsor Lunch, Corporate Presentations

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2:35 PM – 3:25 PM – Concurrent Sessions (50 minutes)

Another Look at StockCentral Marv Kohn	Company Research Using Value Line Reports Ann Cuneaz	The Inner Geek Lives Joe Craig	Secrets of Wall Street Analysts Doug Gerlach	Stock Selection Guide: A Tool to Help Solve the Investment Puzzle Louise Sechler	Exploring Exchange Traded Funds <i>Repeat</i> Jerry Pillans	Open Lab
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3:35PM – 4:25PM – Concurrent Sessions (50 minutes)

SSGs Too Good to Be True John Tonsager	Investing 101 Bob Adams	Techniques for Managing Email and Simplifying Your Life Randy Wilkes	Ten Dumbest Mistakes Investors Make (And How You Can Avoid Them) Doug Gerlach	Five Steps to Smarter Investing: Managing Your Portfolio Irving Roth	Advanced SSG Judgment Decisions <i>Repeat</i> Brian Altschul	Open Lab
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4:35 PM – 5:25 PM – Concurrent Sessions (50 minutes)

Warnings and Red Flags <i>Not</i> on the SSG Ann Cuneaz	Selling Covered Calls Mary Ann Davis	You're Retired, Now What? Tax Efficient Strategies for Surviving Your Retirement Ira Smilovitz	Don't Gamble: Invest in the Best Growth Companies Philip J. Keating, CFA	Manifest Investing Mark Robertson	Using the Stock Comparison Guide Marv Kohn	Open Lab
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Travel Home Safely