



Class Descriptions

August 18, 2007

Saturday Morning

9:15 AM –10:25 AM

Pacific III

There IS a Time to Sell —Mary Ann Davis

Topic: Portfolio, Intermediate

The Portfolio Management Guide (PMG) and Portfolio Evaluation Review Technique (PERT) reports tell you when to sell. We'll turn the clock back to the year 2000 and see examples. You will also learn to establish and read price charts in multiple time frames to identify trends, and learn how to use this information to your advantage when making sell decisions.

Pacific IV

Common Mistakes Even Smart Investors Make and How to Avoid Them —Philip J. Keating, CFA

Topic: Judgment, Personal Finance, Basic

All investors make certain common, often unconscious, decision-making mistakes. Building on the findings of several Nobel Prize winners, modern behavioral finance highlights cognitive, emotional and social factors, such as framing, anchoring, herding, loss aversion, overconfidence and compartmenting. The central paradox of investing is that investors consistently act to buy high and sell low. These irrational behaviors provide opportunities for disciplined investors to profit handsomely. Several recent stock case histories will be reviewed including Cisco Systems, Coca Cola, GE, Home Depot, JDS Uniphase, Lucent and Pfizer.

Emerald I

Introducing StockCentral —Joseph Craig

Topic: Computer/Internet, Data Source, Basic

StockCentral is a new subscription service that provides tools, data and insight to long-term fundamental investors. Learn how to use the online Take Stock software, the screener, the datafiles and other features at StockCentral to improve your investing skills.

Emerald II

Influence of Economic Indicators on the Stock Market —Bart Womack

Topic: Other 20%, Judgment, General, Advanced

This session examines 10 important economic indicators to determine what effect they have individually and collectively on the economy as well as their impact on the stock market. We will access an internet site to retrieve the most recent numbers that draw a picture of today's economy and the stock market.

Emerald III

Portfolio Centered Decision Making —Mark Robertson

Topic: Portfolio, Intermediate

Portfolio design and caretaking can be compared to “staying between the lines.” Steer well and discover answers to what seem to be the most challenging questions of portfolio management. Listen to your portfolio and respond to what it needs.

10:35AM – 11:25 AM

Pacific III

Toolkit Tips and Tricks —Irving Roth

Topic: Software, Basic/Intermediate

Discover the undocumented short cuts and functions in Investor’s Toolkit. This session demonstrates how to get the most out of this powerful stock analysis software.

Pacific IV

Portfolio Management Made Easy —Ellis Traub

Topic: Portfolio, Software, Intermediate

Portfolio management can be easy and fun. This session dispels all of the reasons and excuses we have for either procrastinating or not doing our portfolio management tasks at all.

Emerald I

Check Out the Competition: Select the Best with the SCG —Louise Sechler

Topic: Judgment, Software, Basic

Identify companies within the same industry and use Investor’s Toolkit’s Stock Comparison Guide feature to select the BEST of the group. Analysis is reviewed for growth, management, and price plus several other criteria for up to five companies selected by you.

Emerald II

Exploring Exchange Traded Funds (Repeats Sunday, 9:10) —Jerry Pillans

Topic: Personal Finance, Portfolio, Basic

Are these funds for you? Learn about one of the newest tools for investing. This session covers the basics of ETFs and how to investigate and invest in them.

Emerald III

Dynamics of the SSG —Brian Altschul

Topic: Data Source, Judgment, Intermediate

Learn about the impact of judgment decisions on Stock Selection Guide (SSG) studies through the eyes of two different investment club members. Discuss why multiple versions of an SSG are useful and why it makes sense to come to different conclusions. Basic knowledge of the SSG is beneficial for this session.

11:35 AM - 12:25 PM

Pacific III

Weeding and Feeding Your Portfolio: Buy or Sell (Repeats Sunday, 10:10) —Phillip J. Keating, CFA

Topic: Judgment, Portfolio, Intermediate

Learn to cut the “weeds” and feed the “flowers” in your portfolio by applying the principles of good portfolio management, including prudent diversification. Use Investors Toolkit’s many reports to categorize stock holdings, to spotlight issues that need attention, and to rank holdings on key fundamental factors. Learn why and when to sell and how to use the “Challenger” to find the best candidates as replacements. Session includes sample portfolios with examples and case studies.

Pacific IV

A Psychological Look at Portfolios with Dr. Maury —Dr. Maury Elvekrog

Topic: Basic Portfolio

Finding good stocks is one thing, but putting them together in a portfolio that produces all the benefits of diversification as well as individual company results is another. Your portfolio will benefit from Dr. Maury’s comments on attendee-submitted portfolios.

Emerald I

Exploring Your Inner Geek —Joseph Craig

Topic: Computer/Internet, General Audience

What’s new in tech? This is a fast-paced quick look at new, fun, and possibly important tech developments. We’ll explore the range of current tech developments from digital media to new ways of accessing the Internet and sharing information.

Emerald II

Techniques for Managing E-Mail and Simplifying Your Life —Randy Wilkes

Topic: Computer/Internet, Basic

Virus protection. Firewalls. Cluttered in-box. 18 different passwords. Spam. After this session, you’ll be in control of your computer and have time to do what you really want.

Emerald III

Don’t Just Sit There - Manage Your Portfolio —Seymour Zeenkov

Topic: Portfolio, Software, Basic/Intermediate

Use the Investor’s Toolkit 5 portfolio management process to improve the value of your holdings. This analysis program alerts investors about under-performing stocks and diminishing expected returns. Do not just sit and watch your portfolio, actively manage it.