



Class Descriptions

**Sunday Morning
August 19, 2007**

9:10 AM – 10:00 AM

Pacific III

Using Portfolio Manager with Other Software Tools —Matt Willms

Topic: Computer/Internet, Data Source, Software, Basic/Intermediate

This session reviews several features provided by Portfolio Manager for interacting with other software tools, such as Investor's Toolkit, Stock Analyst, and S&P Stock and Mutual Fund Data Services. Portfolio Manager also utilizes data provided by AAll's Stock Investor Pro software for improving portfolio management decisions. This session provides an overview of using Portfolio Manager with these other software tools.

Pacific IV

SSG Judgment Step-by-Step —Bob Adams

Topic: Judgment, Portfolio, Basic/Intermediate

Do you sometimes question your judgment when completing the SSG? Using readily-available Internet data and simple guidelines to support your judgment, we'll step through each section of the SSG and review limits. We'll take a quick look at the PMG and PERT-A for further confirmation of judgment decisions.

Emerald I

Screening for Winners —Douglas Gerlach

Topic: Screening, Software, Basic/Intermediate

Learn to use stock screening tools to find quality growth stocks for your portfolio. With StockCentral.com's screener or Stock Prospector, you can search for stocks that meet your criteria, thereby finding reasonable candidates for study. Learn how to build a screen, create custom criteria, evaluate results, calculate and review industry averages, and more.

Emerald II

Exploring Exchange Traded Funds (Repeat) —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

Social Security's Future: Winds of Change —Bart Womack

Topic: General, Judgment, Personal Finance, Intermediate

Learn to understand and evaluate the current social security system. This session examines why some economists believe that important changes to the system might mean a much higher payout to retirees in the future and why some economists believe the current system is in trouble.

10:10 AM – 11:00 AM

Pacific III

Economic Castles with Unbreachable Moats —Dana Garoutte

Topic: Industry, Screening, General Audience

Learn what separates bad companies from good ones, and good companies from great ones. In some industries, great companies build an “economic moat” or competitive barrier. The session discusses the types of economic moats and characteristics of companies with economic moats, and identifies some companies in various industries that have economic moats.

Pacific IV

Weeding and Feeding Your Portfolio: Buy or Sell (Repeat) —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 the many reports of Investors Toolkit 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.

Emerald I

Improve Your Portfolio with PERT —Gretchen Hurt

Topic: Portfolio, Intermediate

Learn how to use the Portfolio Evaluation and Review Technique (PERT) to enhance the overall performance of your portfolio. This session is suitable for intermediate and expert investors who understand the SSG.

Emerald II

Exploring Take Stock with Its Developer —Ellis Traub

Topic: Computer/Internet, Data Source, Judgment, Basic

Regarded by some as elementary or simple, Take Stock is no lightweight when it comes to implementing our investment methodology. Enjoy exploring its depths with its developer.

Emerald III

Automating Your Stock Studies —Joseph Craig

Topic: Computer/Internet, Data Source, Basic

Explore the world of free and/or low-cost software, data, and tools to help automate your stock studies. We will explore the entire gamut of available resources, on and off the Internet, that can help you become more efficient in studying stocks and managing your portfolio.

11:10 AM – 12:00 AM

Pacific III

Anatomy of a SSG —Douglas Gerlach

Topic: Judgment, Intermediate

Attend a live, interactive dissection of a company using the Stock Selection Guide—researching the company, projecting growth, adding judgment, and determining if a stock is a buy, sell, or hold. Learn what's important (and what's not) when analyzing a stock using the SSG.

Pacific IV

Advanced Judgment —Mary Ann Davis

Topic: Judgment, Intermediate

Would you like to feel more confident about adding judgment to your SSG? If so, this session is for you. Learn to use the preferred procedure, graphs and the importance of trends, the PERT-A Graph, judgment audit, and notes. We will also compare the performance of a stock in the SSG study to the S&P 500 using a price chart.

Emerald I

Basics of Mutual Funds —Jerry Pillans

Topic: Mutual Funds, Personal Finance, Basic

Learn the basics of how mutual funds work and how to research funds on the Internet.

Emerald II

Armchair Quarterbacking Your Portfolio —Matt Willms

Topic: Portfolio, Basic/Intermediate

Are you effectively managing your portfolio(s) as a general manager does a sports team? If you divide your portfolio into 3 groups or 'squads', you may find the process of managing your holdings more easily accomplished. This session will review how to divide your portfolio into a practice squad/injured reserve, core starters, and all-stars. We'll review characteristics of these groups, and how to use tools such as the Portfolio Manager and Investor's Toolkit software programs to identify when former 'starters' are falling onto the injured reserve and may need to be replaced by potential new core players, or when practice players have the fundamentals to become all-stars.

Emerald III

How Much Will You Need for Retirement? —Bart Womack

Topic: Other 20%, Personal Finance, Intermediate

Learn methods to help ensure that you won't outlive your retirement dollars. Topics include calculating how much you will need for retirement, the advantages of annuitization, and how to compute appropriate portfolio outflows once you reach retirement age.