



## Class Descriptions

**August 19, 2007**  
**Sunday Afternoon**

2:10 PM – 3:20 PM

### *Pacific III*

**Judgment Day: You Are the Judge** —Louise Sechler and Seymour Zeenkov

*Topic: Judgment, Intermediate*

It is judgment day and you are the judge in this interactive session. Take the challenge and make Stock Selection Guide judgment decisions on SSG studies prepared with five-year-old data. Compare your judgment decisions with those of your fellow investors and get immediate feedback based on five years of actual performance. Application of an active portfolio management process will be discussed,

### *Pacific IV*

**Financial Reports 101** —Shanna Rendon

*Topic: Other 20%, General, Basic*

Follow the money to learn about a company. A startup company leads us through the basic items on the balance sheet, income statement and cash flow statement to demonstrate the structure, purpose and interrelationships of the reports.

### *Emerald I*

**Safer Computing by Using Good Online Practices** —Randy Wilkes

*Topic: Computer/Internet, General*

Increase your awareness of the online dangers of using a computer and learn about online practices such as firewalls, viruses, and anti-virus software. This session will discuss the pitfalls of neglecting to take measures to protect your computer and identity. We will cover techniques used to decrease spam, discuss spyware, adware and sneaware and offer suggestions to help protect you from identity theft.

### *Emerald II*

**Using Investor's Toolkit 5 to Analyze Stocks** —Irving Roth

*Topic: Software, Basic*

An in depth journey through the SSG using Investor's Toolkit 5.

### *Emerald III*

**Advanced Investing Techniques with Stock Analyst 3** —Douglas Gerlach

*Topic: Software, Intermediate/Advanced*

Stock Analyst is the most powerful software available for analyzing stocks. This program provides advanced judgment options, custom graphing, and comparison tools that help you make better stock selections. Learn to use the advanced features of Stock Analyst software to gain additional insight into a company by studying the balance sheet, cash flow and more.

## Balboa II

### **Evaluate Management: Understanding Return on Equity** —Gretchen Hurt

*Topic: Judgment, Intermediate/Advanced*

Warren Buffet said that he feels Return on Equity is the best indication of superior management. We will discuss why Return on Equity (Section 2B of the SSG) is so important, and how to interpret changing trends.

**3:30 PM – 4:20 PM**

## *Pacific III*

### **Analyzing an Annual Report....Made Easy** —Bob Adams

*Topic: Other 20%, Judgment, Basic/Intermediate*

If you find the information in the Annual Report daunting, this is a session for you. Only minutes are required for the entire analysis. Find out what to read, what's important, and what's not, and how to analyze all those financial numbers. Enter a ticker symbol, the form is completed automatically, and you're ready for the analysis. In addition to the automatic data feature, the form is updated to include information on competitors, the industry, and five year graphs for comparing important selected data.

## *Pacific IV*

### **Urban Myth Busters: International Investing** —Mark Robertson

*Topic: Industry, Other 20%, Intermediate/Advanced*

International investing is evolving. Thomas Friedman is right: the world is getting flatter. This session tackles a couple of myths about international investing. The bottom line is that investing globally is no different than studying and owning your favorite domestic companies – and the drivers are the same, too.

## *Emerald I*

### **Making Use of Internet Investing Tools** —Marvin Kohn

*Topic: Computer/Internet, Screening, Basic*

We will explore some of the more popular Internet sites for investing and examine how to use them to obtain information on your investments. We'll visit sites that allow you to input your portfolio so that you can examine the performance of individual securities. In addition, we will examine some free online stock screening services and also list fee-based services.

## *Emerald II*

### **Spying on Your Companies** —Joseph Craig

*Topic: Computer/Internet, Other 20%, Intermediate*

It has been said that 80% of everything that you need to know about a company - from an investing point of view - can be gleaned from basic fundamental analysis, such as the SSG or TSSW forms. What is the "other" 20%? Is it important? How do you find it?

## *Emerald III*

### **Psychology of Investment Success with Dr. Maury** —Dr. Maury Elvekrog

*Topic: General*

Investors have their feelings pulled sideways by emotions that distort thinking and then decisions. Dr Maury Elvekrog, a licensed psychologist as well as a columnist for *Better Investing* and chairman of a firm managing a quarter billion dollars, will help us identify and understand these emotions and how to deal with them for better investing results.

## *Balboa II*

### **SSGs Too Good to Be True** —John Tonsager

*Topic: Judgment, Intermediate*

Learn how to proceed when a Stock Selection Guide analysis seems too good to be true. This session uses features in Investor's Toolkit 5 software to make conservative adjustments to an optimistic SSG study. Topics include data outliers, Upside/Downside ratio, PEG ratio and Preferred Procedure.

4:30 PM – 5:20 PM

*Pacific III*

**SEC Website** —John (Jack) McCreery

*Topic: General Audience, Internet*

Learn what information is available for free from the SEC. Our investor information section offers calculators, podcasts, claims funds and investor alerts. You can also learn what forms are important to investors, such as annual reports, prospectuses, and where to find them.

*Pacific IV*

**Small Company Discovery (Repeat)** —Mark Robertson

*Topic: Portfolio, Other 20%, Intermediate*

Why are small companies important to our portfolios? Is it really possible to select smaller companies without greater risk? This session makes the case for shopping for small companies and the positive impact that small companies can have on our portfolios.

*Emerald I*

**Demystifying Judgment (Repeat)** —Ellis Traub

*Topic: Judgment, Basic/Intermediate*

In this session you will learn that, by reducing it to its simplest terms, the decision-making process involved in the Stock Selection Guide is merely a matter of common sense, well within anyone's ability to do it confidently.

*Emerald II*

**SSG - A Tool to Help Solve the Investment Puzzle** —Louise Sechler

*Topic: Judgment, Basic*

Learn to use each piece of the Stock Selection Guide to complete the stock analysis puzzle and determine if a company should be in your portfolio. Each of the five sections of the SSG will be discussed in detail.

*Emerald III*

**Sudden Wealth: Managing a Windfall** —Philip J. Keating, CFA

*Topic: Personal Finance, Portfolio, General*

Learn how to cope with the unexpected responsibility of managing a "large" amount of money whether from an early or full retirement payout, insurance or divorce settlement, inheritance, royalty or other sources. This session examines the common financial, psychological and emotional pitfalls as well as the opportunities presented by a sudden windfall. Topics include checklists for taking stock, hazards to avoid, the first steps in taking control, how to develop an investment policy, basic asset allocation and diversification. This session is appropriate for all investors, but especially retirees and windfall recipients.

*Balboa II*

**Analyzing Insurance Companies** —Gretchen Hurt

*Topic: Industry, Intermediate/Advanced*

Analyzing insurance companies provides special challenges for the investor. Many things in the industry, from how they make money to the terminology used, are unique. In this session, we demystify insurance companies as investments.