

InvestEd 2007 SCHEDULE OF SESSIONS

Saturday Morning, Aug. 18, 2007

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

9:15 AM – 12:25 PM Computer Lab open

Pacific III	Pacific IV	Emerald I	Emerald II	Emerald III	Balboa II	Balboa I Computer Lab
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9:15 AM – 10:25 AM – Concurrent Sessions (70 minutes)

There IS a Time to Sell Mary Ann Davis Topic: Port Intermediate	Common Mistakes Even Smart Investors Make and How To Avoid Them Philip J. Keating, CFA Topic: J, PF Basic	Introducing StockCentral Joe Craig Topic: C, D Basic	Influence of Economic Indicators on the Stock Market Bart Womack Topic: O, J, General, Advanced	Portfolio Centered Decision Making Mark Robertson Topic: Port Intermediate	Registered Newbie Members Only	Open Lab
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10:35 AM – 11:25 AM – Concurrent Sessions (50 minutes)

Toolkit Tips and Tricks Irving Roth Topic: SW Basic/Intermediate	Portfolio Management Made Easy Ellis Traub Topic: Port, SW, Intermediate	Check Out the Competition: Select the Best with the SCG Louise Sechler Topic: J, SW Basic	Exploring Exchange Traded Funds (Repeats on Sunday) Jerry Pillans Topic: PF, Port, Basic	Dynamics of the SSG Brian Altschul Topic: D, J Intermediate	Registered Newbie Members Only	Open Lab
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11:35 AM - 12:25 PM - Concurrent Sessions (50 minutes)

Weeding and Feeding Your Portfolio: Buy or Sell (Repeats on Sunday) Philip J. Keating, CFA Topic: J, Port Intermediate	A Psychological Look at Portfolios with Dr. Maury Dr. Maury Elvekrog Topic: Portfolio Basic	Exploring Your Inner Geek Joseph N. Craig Topic: C General Audience	Techniques for Managing E-Mail & Simplifying Your Life Randy Wilkes Topic: C Basic	Don't Just Sit There – Manage Your Portfolio! Seymour Zeenkov Topic: Port, SW, Basic/Intermediate	Registered Newbie Members Only	Open Lab
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12:30 PM – 2:30 PM Sponsor Lunch, Corporate Presentations

Saturday Aug. 18, 2007 Afternoon Schedule

2:30 PM – 6 PM Newbies only in the Computer Lab

Pacific III	Pacific IV	Emerald I	Emerald II	Emerald III	Balboa II	Balboa I Computer Lab
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2:35 PM – 3:45 PM – Concurrent Sessions (70 minutes)

Advanced SSG Topics: Judgment Aids	Don't Gamble: Invest in the Best Growth Companies	Evaluate Management: Dissecting Pre-Tax Profit	Introduction to Portfolio Manager	How to Recognize and Avoid Fraud	Don't Do That! Avoiding the Worst Practices in Club Accounting	Computer Lab Closed
Bob Adams Topic: J, Intermediate	Philip J. Keating, CFA Topic: J, Scr Intermediate	Gretchen Hurt Topic: J Intermediate/Advanced	Matt Willms Topic: SW Basic	John (Jack) McCreery Topic: G Basic	Daniel Abraham Topic: C, SW Basic	

3:55 PM – 4:45 PM – Concurrent Sessions (50 minutes)

Follow Your Stocks: A Monthly Analysis Tool	Small Company Discovery (Repeats on Sunday)	Demystifying Judgment (Repeats on Sunday)	Select the Best: What You Must Know When Buying a Bank Stock	Industry Studies: The Fundamentals	Don't Gamble Away Your 401(k)	Computer Lab Closed
Bob Adams Topic: Port Basic/Intermediate	Mark Robertson Topic: Port, O Intermediate	Ellis Traub Topic J Basic/Intermediate	Herb Barnett Topic: Ind, O Intermediate/Advanced	Dana Garoutte Topic: Ind, O Basic/Intermediate	Jerry Pillans Topic: MF, PF Basic	

4:55 PM – 5:45 PM - Concurrent Sessions (50 minutes)

In and Out of Fashion: Understanding the Retail Clothing Industry	Origins of Manifest Investing: Role of Quality	Introduction to Cash Flow Analysis	Good Company! But Is It a Good Investment	Introduction to Diversification & Asset Allocation	The Flavors of Take Stock	Computer Lab Closed
Douglas Gerlach Topic: Ind, O Intermediate/Advanced	Mark Robertson Topic: C, J, O, SW Basic/Intermediate	Bart Womack Topic: O, G Intermediate	Herb Barnett Topic: J Basic/Intermediate	Matt Willms Topic: Port Basic	Seymour Zeenkov Topic: SW General Audience	

6:00 PM – 7:00 PM Cash Bar

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

9:30 PM Cyber Café, Computer Lab Open 9:30 PM - midnight

Key to Topics: C=Computer/Internet, D=Data Source, G=General, Ind=Industry, J=Judgment, MF=Mutual Funds, O=Other 20%, PF=Personal Finance, Port=Portfolio Management, Scr=Screening, SW=Software

6/10/07

Sunday, Aug. 19, 2007

Morning Schedule

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

9:10 AM – 12:00 PM Computer Lab Open

Pacific III	Pacific IV	Emerald I	Emerald II	Emerald III	Balboa II	Balboa 1 Computer Lab
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9:10 AM – 10:00 AM – Concurrent Sessions (50 minutes)

Using Portfolio Manager with Other Software Tools Matt Willms Topic: C, D, SW Basic/Intermediate	S&P Judgment Step-by-Step Bob Adams Topic: J, Port Basic/ Intermediate	Screening for Winners with Stock Prospector Douglas Gerlach Topic: Scr, SW Basic/Intermediate	Exploring Exchange Traded Funds (Repeat) Jerry Pillans Topic PF, Port, Basic	Social Security's Future: Winds of Change Bart Womack Topic: G, J, PF Intermediate	Registered Newbie Members Only	Open Lab
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10:10 AM – 11:00 AM – Concurrent Sessions (50 minutes)

Economic Castles with Unbreachable Moats Dana Garoutte Topic: Ind, Scr General Audience	Weeding and Feeding Your Portfolio: Buy or Sell (Repeat) Philip J. Keating, CFA Topic: J, Port Intermediate	Improve Your Portfolio with PERT Gretchen Hurt Topic: Port Intermediate	Exploring Take \$tock with Its Developer Ellis Traub Topic: C, D, J Basic	Automating Your Stock Studies Joseph N. Craig Topic: C, D, Basic	Registered Newbie Members Only	Open Lab
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11:10 AM – 12:00 PM – Concurrent Sessions (50 minutes)

Anatomy of a SSG Douglas Gerlach Topic: J Intermediate	Advanced Judgment Mary Ann Davis Topic: J Intermediate	Basics of Mutual Funds Jerry Pillans Topic: MF, PF Basic	Armchair Quarterbacking your Portfolio Matt Willms Topic: Port Basic/Intermediate	How Much Will You Need for Retirement? Bart Womack Topic: O, PF, Intermediate	Registered Newbie Members Only	Open Lab
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12:00 PM – 2:10 PM Sponsor Lunch, Corporate Presentations

Sunday, August 19, 2007 Afternoon Schedule

2:10 PM – 5:20PM Computer Lab Open

Pacific III	Pacific IV	Emerald I	Emerald II	Emerald III	Balboa II	Balboa I Computer Lab
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2:10 PM – 3:20 PM – Concurrent Sessions (70 minutes)

Judgment Day: You Are the Judge Louise Sechler and Seymour Zeenkov Topic: J Intermediate	Financial Reports 101 Shanna Rendon Topic: O, G Basic	Safer Computing by Using Good Online Practices Randy Wilkes Topic: C General	Using Investor's Toolkit 5 to Analyze Stocks Irving Roth Topic: SW Basic	Advanced Investing Techniques with Stock Analyst 3 Douglas Gerlach Topic: SW Intermediate/Advanced	Evaluate Management: Understanding Return On Equity Gretchen Hurt Topic: J Intermediate/Advanced	Open Lab
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3:30 PM – 4:20 PM - Concurrent Sessions (50 minutes)

Analyzing An Annual Report...Made Easy Bob Adams Topic: O, J Basic/Intermediate	Urban Myth Busters: International Investing Mark Robertson Topic: Ind., O Intermediate/Advanced	Making Use of Internet Investing Tools Marvin Kohn Topic: C, Scr Basic	Spying On Your Companies Joseph N. Craig Topic: C, O Intermediate	Psychology of Investment Success with Dr. Maury Dr. Maury Elvekrog Topic: General	SSGs Too Good to Be True John Tonsager Topic: J Intermediate	Open Lab
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4:30 PM – 5:20 PM - Concurrent Sessions (50 minutes)

The SEC Website John (Jack) McCreery Topic: General Basic	Small Company Discovery (Repeat) Mark Robertson Topic: Port, O Intermediate	Demystifying Judgment (Repeat) Ellis Traub Topic J Basic/Intermediate	Stock Selection Guide... A Tool to Help Solve the Investment Puzzle Louise Sechler Topic: J Basic	Sudden Wealth: Managing a Windfall Philip J. Keating, CFA Topic PF, Port. General	Analyzing Insurance Companies Gretchen Hurt Topic: Ind. Intermediate/Advanced	Open Lab
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Travel Home Safely