

**DirectorEd Class Descriptions**  
**August 17, 2007**

**Friday Afternoon**

**12:15 PM – 1:05 PM**

*Newport II & III*

**Building a Super Presentation** -Mary Ann Davis

Topics, ideas and techniques that have been tried and tested – that's what this class is all about. Examples from chapter and CompuFest presentations are included to demonstrate key points. Some of the topics to be covered are: How to get started? Where do ideas come from? What are the sources of information? What media to use? Why and how to do a screen capture? How to build interest? What special tips and tricks make screen captures better? How to teach to all levels of investors?

*Emerald Bay I & II*

**Teaching Club Accounting** -Daniel Abraham

This is not a class on how to use Club Accounting software - this is a class on how to teach everyone else how to use the Club Accounting software. We'll go through how to prepare for a class, how to keep a class moving and energized, and most importantly, how to make sure your students remember what you've taught them. Attendees are encouraged to take the companion class, "Don't Do That!" to brush up their Club Accounting skills.

**1:10 PM – 2:00 PM**

*Newport II & III*

**A PowerPoint Primer** -Dana Garoutte

Produce a professional looking presentation using Microsoft PowerPoint. In this session we will demonstrate some basic techniques and tips for creating your first PowerPoint presentation.

*Emerald Bay I & II*

**Teaching Investor's Toolkit 5** -Irving Roth

This class demonstrates the most effective way to teach Toolkit 5 to students. It is not a class on how to use Toolkit 5

**2:10 PM – 3:00 PM**

*Newport II & III*

**SnagIt: Basic** -Shanna Rendon

This basic level course demonstrates how to use screen capture software to create better documents by including images in PowerPoint presentations, newsletters and chapter communications. You'll see screen capture "Input" images using stock analysis software and Web pages, and finish by placing the "Output" screen captures into presentations and communications.

*Emerald Bay I & II*  
**Teaching Portfolio Manager**  
Matt Willms

Learn how to teach Portfolio Manager, a powerful, popular management and record-keeping program for individual investors. The class demonstrates the program's features and shows how it integrates with Toolkit 5 and the BI S&P Stock and Mutual Fund Data Services. Learn how to schedule a webinar event for your chapter and about other teaching resources. For example, there are PowerPoint presentations available to use for local classes.

**3:05 PM – 3:55 PM**

*Newport II & III*

**Advanced Tips for PowerPoint Users** -Herb Barnett

As you become more comfortable making simple PowerPoint presentations, you'll find yourself wanting to use special features like animation, slide transitions, graphics, etc. We'll show you how to apply, *and control*, them to create a smooth, professional looking presentation. When your presentation is finished, you'll also want to print effective handouts from them, so we'll have a few tricks to show you here, as well.

*Emerald Bay I & II*

**Discussion Group: 21<sup>st</sup> Century Tools to Help Directors**

Panel: Brian Altschul, Joseph Craig, Douglas Gerlach, Randy Wilkes

There are many new tools available for investors with a long-term outlook. Come hear a panel that has intimate experience with the old tools as well as the new tools, and find out how to use them to the best advantage. Exchange ideas with your fellow directors in a discussion and learn how they use the tools in classes and events.

**4:05 PM – 4:55 PM**

*Newport II & III*

**SnagIt: The Next Level** -Shanna Rendon

Additional types of screen capture "Inputs" as well as editing the capture before inserting into the presentation will be demonstrated. There are many "Output" formats available and we'll explore which works best. Finally, we will look at why and where to store the images.

*Emerald Bay I & II*

**Discussion Group: Does Your Chapter Need a Model Club?** Discussion Leader: Jerry Addleman

Does your chapter need a Model club? If you are having problems attracting good directors for your chapter, try a model club. This is just one of the many benefits of a model club that we will discuss.

**5:00 PM – 5:50 PM**

*Newport II & III*

**Excel Beyond the Basics** -Marvin Kohn

Learn how to use some lesser-known and powerful elements of Microsoft Excel 2003, and earlier versions, to ease and simplify your chapter's work. This class is designed for current users of these programs, and for users of the equivalent free Open Office programs. Topics include how to use some of the simpler Excel functions and how to customize the toolbars in both programs. (Note that this class does not cover the new Microsoft Excel 2007.)

*Emerald Bay I & II*

**Panel Discussion: Sustaining and Maintaining a Strong Chapter When Membership is Declining**

Panel: Bob Adams, Mary Ann Davis, John Tonsager

Is your chapter in need of ideas to build your chapter and membership? If so, come and hear three CGAB alumni share ideas that they used successfully in their chapters. We also invite you to share your ideas, questions or problems. Group dynamics is a great way to share and problem solve. Who knows, your idea might inspire another chapter to reach new heights!