

## Newbie Program

### Saturday

**9:15 - 9:20 Welcome —Marvin Kohn**

**9:20 - 10:10 Basic Concepts for Investing  
—Dana Garoutte**

How CAN we become successful investors, and in what are we investing? We will learn the investment principles that have guided successful investors; explore how a publicly-traded company develops and grows; and learn the meaning of basic terms used in evaluating a company.

**10:10 - 10:20 Break**

**10:20 - 11:10 Introduction to the SSG —  
Herb Barnett**

The Stock Selection Guide (SSG) is a basic evaluation tool. In this session we will introduce each section of the SSG and discuss what is being displayed and its importance.

**11:15 - 12:25 Getting Started With Judgment  
—Mary Ann Davis**

The SSG is a tool and not the answer in the stock study process. The SSG requires the addition of judgment to be useful for the investor. The session is designed to help new investors develop their judgment skills.

**12:30 - 2:30 Lunch**

**2:30 - 3:30 Getting Started With Toolkit  
—Marvin Kohn**

The session, held in the lab, demonstrates how to start Toolkit 5 software and steps through the sections of the SSG. We focus on the elements of the software, preparing for the actual lab instruction using actual stock data.

**3:30 - 3:40 Break**

**3:40 - 6:00 Computer Lab —Shanna  
Rendon**

This is a hands-on session using Toolkit 5. You will have an opportunity to apply all that you have learned earlier. You will be assisted by a lead instructor and by experienced tutors who will ensure that you fully understand the workings of the software, and are able to use it when you return home.

### Sunday

**9:10 - 9:55 The SSG — Putting the Pieces  
Together —Kathy Tegtmeier**

Having learned about and tried all of the basic SSG elements, we are ready to look at it as a complete entity. Now we have the tools to ask the important question: What have we learned and how can we use it?

**9:55 - 10:05 Break**

**10:10 - 11:05 How to Use SDS, StockCentral,  
and the Web For SSG Data —  
John Tonsager**

You will learn all you need to know to get data from StockCentral and BI's SDS automatically into your SSG. Various financial websites will be demonstrated to show how to find industry averages and to compare data with other companies in the same industry.

**11:10 - 11:40 Design Your Basic Portfolio —  
Seymour "Zinc" Zeenkov**

Learn how to design a fine, basic portfolio based on these principles. Find out why diversification decreases your risks and how to add diversity to your portfolio. Begin to enjoy the comfort of controlling your own financial destiny

**11:40 - 12:00 ... and In Conclusion ... —  
Marvin Kohn**

We'll sum up the day and-a-half's experience and chart a course forward. We'll examine the Sunday InvestEd schedule to select topics that would be of interest to you.