

Conference Seminar Schedule

2008 BetterInvesting National Conference

Friday, June 20, 2008

Tracks and Rooms

rev. 5/21/08

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|---|---|---|--|--|---|---|---|---|--|
| Discover Investing <i>Schaumburg AB</i> | Investing for Beginners Using Online Tools <i>Schaumburg CD</i> | Beyond Beginner <i>Utopia A</i> | Building a Better Investment Club Mutual Funds <i>Utopia B</i> | Portfolio Concepts <i>Utopia C</i> | Financials/Annual Reports <i>Utopia D</i> | Computer Software/Internet Advanced Topics <i>Nirvana A</i> | Portfolio Concepts General <i>Nirvana B</i> | Advanced Topics Industry Studies/Workshops <i>Nirvana C</i> | Industry Studies/Workshops Financial Planning <i>Schaumburg EF</i> |
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9:00 AM – 9:50 AM – Concurrent Sessions (Note time change on “What is a Quality Company?”)

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| <i>9:00 AM – 10:05 AM</i> What is a Quality Company? <i>Beginner</i> Jennifer Evans Penley DI 104 | Using the Online Stock Selection Guide to Determine Risk and Reward <i>Beginner</i> Ken Kavula OT 113 | Determining Value in Stock Selection <i>Beginner/Intermediate</i> Mary Enright BB 204 | The Perfect Investment Club <i>All levels</i> Mimi Rauschelbach IC 216 | When to Sell <i>Beginner/Intermediate</i> Allen Holdsworth PC 228 | What We Learn From the Balance Sheet <i>Intermediate</i> Gretchen Hurt AR 238 | Stock Screening for Winners <i>(same as CS 270) Intermediate</i> Diane Amendt CS 264 | Using Value Line as a Supplement <i>All levels</i> Mike Berman G 269 | Small Company Discovery <i>Intermediate/Advanced</i> Mark Robertson AT 280 | Post Its and Pencils for Profit: Retail Industry Study <i>Beginner/Intermediate</i> Irina Clements IS 248 |
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10:00 AM – 10:50 AM – Concurrent Sessions (Note time change on “It’s Not Just Quality: Did You Build in Value?”)

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| <i>10:25 AM – 11:40 AM</i> It’s Not Just Quality: Did You Build in Value? <i>Beginner</i> Diane Amendt DI 105 | Using the Online Stock Comparison Guide <i>Beginner</i> Kim Butcher OT 114 | Hands-On Research: Part 1 <i>Beginner/Intermediate</i> Mary Enright and Ron Jaynes BB 205 | Handling Investment Club Problems <i>All levels</i> Gary Ball, Avi Horwitz, Mimi Rauschelbach and Bonnie Reyes IC 217 | Introduction to Diversification & Asset Allocation <i>All levels</i> Matt Willms PC 229 | Cash Flows: What is the Company Doing with my Money? <i>Intermediate/Advanced</i> Ron Bruyn AR 239 | Using Excel with Toolkit & Internet Data: Part 1 <i>Advanced</i> Jim Thomas CS 261 | How to Recognize and Avoid Fraud <i>All levels</i> Jack McCreery G 270 | Red Flags NOT on the Stock Selection Guide <i>Intermediate/Advanced</i> Ann Cuneaz AT 281 | Analyzing the Banking Industry <i>Intermediate/Advanced</i> Cy Lynch IS 249 |
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11:00 AM – 11:50 AM – Concurrent Sessions

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| <i>10:25 AM – 11:40 AM (Continuation from above class)</i> It’s Not Just Quality: Did You Build in Value <i>Beginner</i> Diane Amendt DI 105 | Making Money with Mutual Funds Using BetterInvesting Online Tools <i>(same as MF 276) Beginner</i> Dennis Genord OT 115 | Hands-on Research, Part 2 <i>Beginner/Intermediate</i> Mary Enright, Ron Jaynes, Kim Butcher BB 206 | Demystify the Club Reports <i>All levels</i> Noreen Carpenter IC 218 | Avoiding Concentrated Positions in Your Portfolio: The Elephant in the Room <i>(same as PC 271) Beginner/Intermediate</i> Matt Willms PC 230 | Putting It All Together: Tools to Simplify Your Analysis <i>Intermediate/Advanced</i> Ron Bruyn AR 240 | Using Excel with Toolkit 5 & Internet Data: Part 2 <i>Advanced</i> Jim Thomas CS 262 | Bonds: The Other Part of Your Portfolio <i>All levels</i> Gary Ball G 271 | The Pharmaceutical Industry: Is There a Future? <i>Intermediate/Advanced</i> Hugh McManus IS 282 | Suddenly a Widow or Widower Be! <i>All levels</i> Anne Uno FP 253 |
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Friday, June 20, 2008 (Page 2)

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| Discover Investing <i>Schaumburg AB</i> | Investing for Beginners Using Online Tools <i>Schaumburg CD/Euphoria</i> | Beyond Beginner <i>Utopia A</i> | Building a Better Investment Club <i>Mutual Funds Utopia B</i> | Portfolio Concepts <i>Utopia C</i> | Financials/Annual Reports <i>Utopia D</i> | Computer Software/Internet <i>Advanced Topics Nirvana A</i> | Portfolio Concepts <i>General Nirvana B</i> | Advanced Topics <i>Nirvana C</i> | Industry Studies/Workshops <i>Financial Planning Schaumburg EF</i> |
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2:00 PM – 2:50 PM – Concurrent Sessions (Note time and room change to “Creating a Stock Study Using the Online Stock Selection Guide”)

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| What Should Our Portfolio Look Like? <i>Beginner</i> Jennifer Evans Penley DI 106 | Room: Euphoria 2:00 PM – 3:55 PM Creating a Stock Study Using the Online Stock Selection Guide <i>Beginner</i> Shanna Rendon OT 116 | Discussion of a Growth Company <i>Beginner/Intermediate</i> Moderator: Ron Jaynes; Panel: Carol Crosta, Avi Horwitz, Julie Werner BB 207 | The Only Performance Number You Need <i>All levels</i> Rob Nagler IC 219 | Benchmarking: Are You Beating the Market <i>Beginner</i> Jim Thomas PC 231 | Footnotes: Finding the Hidden Message <i>Intermediate/Advanced</i> Bonnie Reyes AR 241 | Research What You Own or How to Continue Learning About What’s In Your Portfolio <i>Intermediate</i> Ken Kavula CS 266 | The Discipline of Selling <i>(same as G 267)</i> <i>Intermediate/Advanced</i> Mark Robertson G 272 | Using Sustainable Growth to Make Projections <i>Advanced</i> James Hurt AT 283 | Evaluating Risk in Your Financial Plan: Eldercare <i>All levels</i> Anne Uno FP 254 |
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3:05 PM – 3:55 PM – Concurrent Sessions

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| Getting the Most Out of EXPO & Investor Relations <i>All levels</i> Gary Ball DI 107 | Room: Euphoria 2:00 PM – 3:55 PM <i>(Continuation of above class)</i> Creating a Stock Study Using the Online Stock Selection Guide <i>Beginner</i> Shanna Rendon OT 116 | Comparison Shopping for Stocks <i>(same as G 266)</i> <i>Beginner/Intermediate</i> Diane Amendt BB 208 | Is Your Investment Club Successful? <i>All levels</i> Ron Jaynes IC 220 | Portfolio Evaluation Review Technique (PERT) for Stocks <i>(same as BB 212)</i> <i>Beginner/Intermediate</i> Sue Jensen PC 232 | Financial Shenanigans <i>Intermediate/Advanced</i> Ron Bruyn AR 242 | Which Software is Right for You? <i>All levels</i> Deane Jaeger CS 260 | Using Internet Resources to Empower Investors <i>All levels</i> Kristin Kaepplein G 273 | Investing for Cash Flow <i>All levels</i> Allen Holdsworth AT 284 | Finding and Working with a Financial Planner <i>All levels</i> Cy Lynch FP 255 |
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4:10 PM – 5:00 PM – Concurrent Sessions

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| Stock Research for Beginners <i>Beginner</i> Noreen Carpenter OT 117 | Estimating EPS Using the Preferred Procedure <i>Beginner/Intermediate</i> Ann Cuneaz BB 209 | Closed-End Funds: What’s Old is New Again <i>All levels</i> TBA MF 221 | Armchair Quarterbacking Your Portfolio <i>Beginner/Intermediate</i> Matt Willms PC 236 | Case Studies: The Financial Statements <i>Intermediate</i> Bonnie Reyes AR 243 | Toolkit 5 Power Users Tips <i>Intermediate/Advanced</i> Jim Thomas CS 265 | Using Manifest Investing to Center Portfolio Decision-Making <i>Intermediate</i> Cy Lynch G 274 | Effective Resources for Stock Studies <i>Intermediate/Advanced</i> Mark Robertson AT 285 | Distribution and Taxation of Retirement Plans <i>All levels</i> Anne Uno FP 256 |
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