

Conference Seminar Schedule

2008 BetterInvesting National Conference

Sunday, June 22, 2008

Tracks and Rooms

rev. 5/21/08

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| Assorted <i>Nirvana B</i> | Computer Lab <i>Euphoria</i> <i>(Computer Lab)</i> | Assorted <i>Nirvana A</i> | Assorted <i>Utopia A</i> | Financial Planning Mutual Funds <i>Utopia B</i> | Portfolio Concepts <i>Utopia C</i> | Industry Workshops <i>Utopia D</i> | Assorted <i>Nirvana C</i> |
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9:00AM – 9:50 AM – Concurrent Sessions

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| Internet Tools for Investing <i>Beginner</i> Jennifer Evans Penley D 108 | | Workshop Using Online Tools (Double Session) <i>Beginner</i> Ken Kavula and James Hurt OT 119 | SSG Bloopers: Adding Judgment <i>Beginner/Intermediate</i> Gary Ball BB 210 | Is a Roth IRA Conversion Right for You in 2010? <i>All levels</i> Carol Crosta FP 276 | Balancing Taxable and Non-taxable Portfolios <i>Intermediate/Advanced</i> Matt Willms PC 233 | Case Study: Analyzing a Restaurant <i>Intermediate/Advanced</i> Cy Lynch IW 250 | Understanding and Using P/E Ratios <i>All levels</i> Allen Holdsworth AT 288 |
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10:05 AM – 10:55 AM – Concurrent Sessions (Note time change on “Discover Investing in the Computer Lab”)

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| Disaster Planning <i>All levels</i> Anne Uno FP 275 | <i>10:00 AM – Noon</i> Discover Investing in the Computer Lab <i>Beginner</i> Jennifer Evans Penley DI 109 | Workshop Using Online Tools (Continuation) <i>Beginner</i> Ken Kavula and James Hurt OT 119 | Improving SSG Judgment <i>Intermediate</i> Mary Enright BB 211 | Exchange-Traded Funds: The Hottest New Investment <i>General</i> Allen Holdsworth MF 225 | A Closer Look Using PERT Worksheet-A <i>Beginner/Intermediate</i> Ann Cuneaz PC 234 | Case Study: Analyzing a Bank <i>Intermediate/Advanced</i> Cy Lynch IW 251 | Manifest Investing: A Guided Tour <i>Intermediate</i> Mark Robertson AT 287 |
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11:10 AM – Noon – Concurrent Sessions

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| Genentech: The First Major Biotechnology Company <i>Intermediate</i> Hugh McManus IW 253 | <i>10:00 AM – Noon</i> Discover Investing in the Computer Lab <i>Beginner</i> Jennifer Evans Penley DI 109 | Stock Screening for Winners <i>(same as G 264)</i> <i>Intermediate</i> Diane Amendt CS 270 | Portfolio Evaluation Review Technique (PERT) for Stocks <i>(same as PC 232)</i> <i>Beginner/Intermediate</i> Sue Jensen BB 212 | Making Money with Mutual Funds Using BetterInvesting Online Tools <i>(same as OT 115)</i> <i>Beginner</i> Dennis Genord MF 276 | Avoiding Concentrated Positions in Your Portfolio: The Elephant in the Room <i>(same as PC 230)</i> <i>Beginner/Intermediate</i> Matt Willms PC 235 | Case Study: Analyzing an Insurance Company <i>Intermediate/Advanced</i> Gretchen Hurt IW 252 | Dividends Matter! <i>Intermediate</i> Shanna Rendon AT 286 |
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