

Pittsburgh Chapter NAIC BetterInvesting Individual Investor Education Activities

E-Magazine Edition - July 2007 Update

The Month In Review (give or take a few weeks)

This month, the layout of this newsletter is a little different, being organized into two major sections. The first section will be focused on local (Pittsburgh Chapter) activities. The second section is a collection of national communications and messages that have been sent in order to keep everyone informed. A PDF version of this newsletter is stored on the Chapter's website.

The Pittsburgh Chapter's mission is to add benefits to your membership, and staying in touch is one of those benefits. We are striving to continue to be the premier educator of personal finance and investor education in western Pennsylvania for individual investors and investment clubs. If you want the Chapter to do more for you or your club, please let us know what we can do, and we'll give it our best effort.

If you have any questions or comments, about any BetterInvesting topic or need, please feel free to contact Pat Donnelly, at president@pittsburgh.betterinvesting.net

The volunteer chapter directors continue to provide support and run events on a monthly basis. Without their commitment, many of these programs would not succeed. Take the chance to thank a volunteer.

Thanks again, and we look forward to seeing you at one of our upcoming events!

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Portfolio Tune Ups

During the last few months, several of the volunteer directors have been redeeming the free coupons that some clubs received for a free Portfolio Tune Up. These tune ups have been very well received, informative, and the directors always come away with some new information to share with others. We also are learning and constantly improving the program. A Portfolio Tune Up consists of a thoughtful and cooperative review of your club's portfolio. Several directors participate in the review, research, and presentation at your club's meeting. We would love to come out and conduct a Portfolio Tune Up for your club's portfolio. These sessions are designed to be thought provoking, inspiring, and educational. At the very least, you should find how your club might be able to get a coupon in the future!

Let's Talk Stocks

Next session **When: 08/28/2007 - 7:00 pm - 9:00 pm** **Where: Eat N Park in Robinson** (100 Park Manor Drive, Pgh. 15205. Steubenville Pike at the Parkway West interchange. Phone number is (412-787-8556) **Cost: **FREE**** **Visitors Welcome** A new educational component is going to be featured at the August meeting. The topic of discussion will be **Stock Screening**. **On August 28th**, the discussion will be "**What Is A Stock Screen?**" and "**How To Use a Stock Screen**"

Review of the June Meeting - On June 26th, the Let's Talk Stocks program met for the bi-monthly meeting. 6 new stocks were introduced and presentations were made. These stocks were:

- Fastenal (FAST)
- Corporate Executive Board (EXBD)
- Intuitive Surgical (ISRG)
- Knight Transportation (KNX)
- Oracle (ORCL)
- Delphi Financial Group (DFG)

Cindy Custer, as a program coordinator, has put together the following list of stocks that have been presented in the Let's Talk Stocks program, and their progress since being introduced.

Company Name	Ticker Symbol	Date Introduced	Price Movement - through last meeting
Pool Corporation	POOL	2/27/07	UP
Carbo Ceramics	CRR	2/27/07	EVEN
East West Bancorp	EWBC	2/27/07	UP
Portfolio Recovery	PRAA	2/27/07	UP
Forest Labs	FRX	2/27/07	DOWN
Goldman Sachs	GS	2/27/07	UP
Spartan Motors	SPAR	2/27/07	UP
Rowan Companies	RDC	2/27/07	UP
Smith International	SII	4/24/07	UP
Starbucks	SBUX	4/24/07	DOWN
Joy Global	JOYG	4/24/07	UP
Helmerich & Payne	HP	4/24/07	UP
Quality Systems	QSII	4/24/07	DOWN
Fastenal	FAST	6/26/07	
Corporate Executive Board	EXBD	6/26/07	
Intuitive Surgical	ISRG	6/26/07	
Knight Transportation	KNX	6/26/07	
Oracle	ORCL	6/26/07	
Delphi Financial	DFG	6/26/07	

Speaking of **Stock Screening**, coming to **Let's Talk Stocks** is a great way to find out about companies that you might not normally be interested in, plus you get to hear some research that other people have done. Saving you time and effort, look like a hero to your investment club partners, or just get some good ideas for your own portfolio!

Other Future Pittsburgh Chapter Events

- **Scheduled Classes** will resume beginning in September, please check the Chapter's website for topics, locations, and schedules.
- **Model Clubs** continue to meet throughout the summer. For the Shaler location, the 2nd Saturday of the month, beginning at 10:00 a.m. For the Penn Hills location, the 4th Saturday of the month, beginning at 9:00 a.m.

Does your club need a jumpstart?

- **Custom Classes For Your Club or Group.** We can offer classes of your choice on BetterInvesting topics to your club or group. Please call 412-635-6242 or email president@pittsburgh.betterinvesting.net for more information.

Investors Roadshow - South

We would like to announce the [Investors Roadshow - South](#) which is being held on Saturday, November 3rd. The event is being held at Washington and Jefferson College, in Washington, PA.

Topics Include:

- When to sell
- Where to find stocks to study
- Where and how to find information about companies
- Discussion and feedback about your club's portfolio (must be submitted in advance)
- Other topics as requested

The featured speaker and teacher is Mary Ann Davis. Mary Ann is a Director and Computer Group coordinator of the Milwaukee Chapter, 1995 Dick Dwyer Service Award winner, and a graduate of University of Wisconsin, La Crosse. She studied at the University of Wisconsin, Madison and the New York Institute of Finance. Mary Ann is a retired teacher and photographer.

We will be communicating more about this event over the next few months. We plan on having a nationally known guest speaker, plenty of discussion, and possibly some portfolio reviews. Stay Tuned!!!

Initiatives Coordinating Committee - News from Headquarters

The [Initiatives Coordinating Committee \(ICC\)](#), was born out of an initial email by Larry Reno on Chapter Chat. Entitled "A Chance to Make a Difference," it said in part, "This is YOUR opportunity to have an impact on this organization that we all love. Please send your recommendations of "actions" that headquarters should take to improve the organization. You can send them to icc@lists.betterinvesting.net.

Identify those that you believe will have the biggest impact. Please keep an open mind on this issue. It is imperative that we get a consensus of what our volunteers think.

Volunteers are BetterInvesting's most important resource!"

Many ideas and suggestions initially were sent to Larry or Chapter Chat and have been forwarded to the ICC. The committee is working on prioritizing and forwarding information to headquarters with recommendations. There will also be reporting back to the directors keeping everyone informed.

The first task the committee took on was a change in the BI Web Site. Chapters made it clear that non-members should have access to information regarding local chapter events and a name to contact for more information before a new person has to join for a fee. The committee and HQ staff has worked together to come up with a workable interim solution for non-members' access. Other suggestions are being considered and we hope everyone will understand that some things will take time. As with any negotiation, no one gets everything and flexibility is imperative. We are encouraged with the spirit of congeniality.

Two separate Chapter Boards have worked on this as a board and submitted their concerns and suggestions. We encourage everyone, whether as an individual director or a complete board, to let the committee know what you feel needs to be addressed.

The committee is made up of Diane Amendt, chair; Gary Ball, Sandy Barlow, Irina Clements, Gretchen Hurt, and Sue Peterman.

We look forward to hearing from you!!

Good News For S&P Stock Data Users - News from Headquarters

The S&P Stock Data Service has a well earned reputation as a robust, highly reliable data source—the perfect compliment to BetterInvesting's online stock analysis tools and desktop software. And now, the newest version of this powerful data delivery system includes:

- Earlier daily data updates
- More robust bank revenue calculations
- Less NULL values for ROE, PTP and tax rate calculations
- More complete data sets for Canadian companies
- Improved dividend accuracy
- Data reported in company's native currency (affects some Canadian companies)
- Elimination of companies without annual reported data

Current users will be automatically switched to the updated service when they access the data feed during the week of June 18th. The updated S&P Stock Data Service is fully compatible with all current versions of BetterInvesting software. However, some older software versions may require an upgrade or update. Please contact Member Services at 877-275-6242 with any questions or concerns.

This enhanced capability is part of BetterInvesting's ongoing commitment to bringing members the very latest in investing tools and technology. As always, we appreciate your support as we roll out this important service upgrade.

BetterInvesting's Stock Data Service - Access Reminder - News from Headquarters

A quick reminder to check your login details when trying to access BetterInvesting's Stock Data Service through Toolkit 5, Prospector, Classic Plus or Stock Analyst. The login ID and password information should be the same login and password used to access BetterInvesting's website. BetterInvesting has recently updated our servers that deliver the Standard & Poor's Stock Data Service to Investor's Toolkit 5, Classic Plus, Stock Analyst, Take Stock, Stock Prospector and Portfolio Manager.

- Please do not use your e-mail address as your login ID.
- Should you have forgotten your password, you may reset it using the ['Forgot Your Password?'](#) link on BetterInvesting's home page at <http://www.betterinvesting.org>

If you are unsuccessful accessing the service, the most probable cause is that you tried to access the Stock Data Service using your e-mail as your 'ID' rather than your website User Name. Please take a moment to make sure your software preferences reflect your website 'User Name' as your 'ID'. This should be the same User Name that is used to access the BetterInvesting website. If you have not changed your User Name it will be the same as your 6 or 7 digit Member ID (without the leading zeroes).

For Toolkit 5 users:

Select 'Preferences' from the top blue bar. That will open another window. Select "File Locations" from the lower left tabs. Then click on the "Select Data Subscription" button in the upper right. This will open up a window for your user ID and Password. Please change your email to your User Name (usually your Member ID). Click 'Ok' twice to exit the dialog boxes. You should now be able to access the data feed.

For Stock Analyst users:

Select 'Options' from the top menu bar Select 'Preferences' from the dropdown menu Click on the 'General' tab In the box labeled 'Email Address:' enter your website login (usually your Member ID) Click 'Ok' to record the change

For Classic Plus users:

Select 'Options' from the top menu bar Select 'Preferences' from the dropdown menu Click on the 'General' tab In the box labeled 'Email Address:' enter your website login (usually your Member ID) Click 'Ok' to record the change

For Stock Prospector users:

Click on the 'Import' button In the text box labeled 'Email' replace your email address with your website login (usually your Member ID) Click 'Apply Changes' to record the change

For Portfolio Manager users:

Select the 'File Menu | Preferences' choice. Select the tab labeled 'BetterInvesting Online.' This will open up a window for your user ID and Password. Please change your Login ID, replacing your email with your User Name (usually your Member ID). Click the 'Save' button. Select the Exit button to close the BetterInvesting preferences tab. You should now be able to access the data feed.

If you have any further questions, please do not hesitate to contact service@betterinvesting.org or call 877-275-6242.

Change In Online Mutual Fund Data Provider - News from HeadQuarters

Beginning July, 2007, the mutual fund data provider for BetterInvesting's online mutual fund analysis tools will change from Standard and Poor's to Lipper. This change is a result of the recent acquisition of Standard and Poor's mutual fund data service by Morningstar, Inc. We look forward to a smooth transition and will keep you up to date with our progress in the weeks ahead.

If you have immediate questions or concerns, please contact Dennis Genord at 1-877-275-6242 ext. 371.

BINC 2008 Early-Bird Registration Extended! - News from HeadQuarters

The early-bird registration for BINC 2008 in Schaumburg, IL has been extended through July 31, 2007 in response to chapter requests to allow them time for chapter meetings to set their approval policies. Look for the updated Banner Ad on our BetterInvesting member home page no sooner than Monday... AGAIN, early-bird prices are extended through July 31, 2007.