

Puget Sound Chapter Investors Education Conference 2009 Class Schedule

Friday — Nov 20, 2009

Beginner Track

Room #

10:00	Registration opens		407
11:00	Computer Lab & Investors Showcase open (closed during sponsor presentations)		406
11:00	Book Sales opens (closed during sponsor presentations)		406
Class / Presentation			
11:30	Opening Remarks	Carol Theine, President, Puget Sound Chapter	404-405
12:00	Gary Ball	Portfolio Allocation	404-405
12:00	Avi Horwitz	The Income Statement: Is This A Money Maker?	401
12:00	Doug Gerlach	Identifying Excellence in Company Management	402
12:00	Laurie Frederiksen	Investment Club Accting - Orientation For Club Members	403
12:00	Bruce Ellis	Why Invest?	<input checked="" type="checkbox"/> 408-409
1:00	Mark Robertson	Selling: Decision Making	404-405
1:00	Avi Horwitz	Every Picture Tells A Story	401
1:00	Carol Theine	Using Value Line for Company Research	402
1:00	Stephen Meizinger	Introduction To Options	403
1:00	Bob Adams	Investing 101, Part 1	<input checked="" type="checkbox"/> 408-409
1:00	Laurie Frederiksen	It's Worth Your While To Reconcile	406
2:00	Sponsor Presentation	Procter & Gamble	404-405
2:35	Break – Computer Lab Open (room 406)		
3:00	Mark Robertson	Manifest Investing: A Guided Tour	404-405
3:00	Jim Thomas	What's New With Toolkit 6?	401
3:00	Gary Ball	Bonds: The Other Part of Your Portfolio	402
3:00	Avi Horwitz	Hidden In Plain Sight: Potential Company Problems	403
3:00	Bob Adams	Investing 101, Part 2	<input checked="" type="checkbox"/> 408-409
4:00	Sponsor Presentation	TSYS (Total System Services)	404-405
4:35	Break – Computer Lab Open (room 406)		
5:00	Gary Ball	SSG Bloopers: Adding Judgment to your SSGs	404-405
5:00	Lucille Chang	Using Price-to-Book Ratios as a Relative Valuation Tool	401
5:00	Avi Horwitz	Challenging Weak Stocks in Your Portfolio	402
5:00	Bruce Ellis	Club Innovations	403
5:00	Bob Adams	Investing 101, Part 3	<input checked="" type="checkbox"/> 408-409
5:00	Doug Gerlach	A Hands-On Overview of Toolkit 6	406
6:00 to 7:00:	Computer Lab Open (room 406); Club Meet & Greet (rooms 404-405)		406

Puget Sound Chapter Investors Education Conference 2009 Class Schedule

Saturday — Nov 21, 2009

Beginner Track

Room #

8:30	Registration opens		407
8:30	Computer Lab & Investors Showcase open (closed during sponsor presentations)		406
8:30	Book Sales opens (closed during sponsor presentations)		406
Class / Presentation			
9:00	Robertson & Copeland	Healthcare: Challenges and Opportunities, Part 1	404-405
9:00	Carol Theine	Life Happens: An Financial First Aid Kit	401
9:00	Gary Ball	DHR – A Stock to Study	402
9:00	Mike Torbenson	Retirement Planning: Tracking Progress	403
9:00	Jim Thomas	SSG Intro, Part 1	<input checked="" type="checkbox"/> 408-409
10:00	Robertson & Copeland	Healthcare: Challenges and Opportunities, Part 2	404-405
10:00	Bob Adams	How I Analyze a Company - going outside the box	401
10:00	Avi Horwitz	The Simplified Income Statement: Preferred Procedure	402
10:00	Doug Gerlach	Stock Selling Guide	403
10:00	Jim Thomas	SSG Intro, Part 2	<input checked="" type="checkbox"/> 408-409
10:00	Laurie Frederiksen	It's Worth Your While To Reconcile	406
11:00	Sponsor Presentation	General Electric	404-405
11:45	LUNCH IN HALL B (on the first floor)		Hall B
1:00	Mark Robertson	Open Season: Stocks & Funds	404-405
1:00	Bob Adams	Analyzing an Annual Report - a structured method	401
1:00	Dan Rutter	Weeding & Feeding Your Portfolio	402
1:00	Carol Theine	Stock Screening for Winners	403
1:00	Jim Thomas	SSG Intro, Part 3	<input checked="" type="checkbox"/> 408-409
2:00	Gary Ball	When to Sell – Besides Never!	404-405
2:00	Avi Horwitz	The Balance Sheet: Are We Solvent?	401
2:00	Laurie Frederiksen	bivio LIVE	402
2:00	Bruce Ellis	Five Errors Clubs Make	403
2:00	Jim Thomas	SSG Intro, Part 4	<input checked="" type="checkbox"/> 408-409
2:00	Doug Gerlach	A Hands-On Overview of Toolkit 6	406
3:00	Sponsor Presentation	Deutsche Telekom	404-405
3:35	Break – Computer Lab Open (room 406)		406
4:00	Mark Robertson	Fund Analysis	404-405
4:00	Avi Horwitz	The Cash Flow Statement: It's My Money	401
4:00	Mike Torbenson	How to Spell P/E	402
4:00	Stephen Meizinger	Why Use Options?	403
4:00	Jim Thomas	SSG Intro, Part 5	<input checked="" type="checkbox"/> 408-409
5:00	Ball, Robertson, Theine	Let's Talk Stock!	404-405
5:50 to 6:00:	Closing Remarks		404-405