



Session Descriptions August 7–8, 2010

Sunday Afternoon, August 8, 2010

2:40 PM – 3:50 PM
Chesapeake I

Mary Ann Davis
Selling Cash Secured Puts

Would you like to buy stocks at a lower price and earn money in the process? You can do exactly that by selling cash secured puts. Learn a step-by-step process for using this strategy to increase your monthly cash flow. This session is an appropriate follow up to *Selling Covered Calls*.

Loch Raven

Phil Keating
Sources of Earnings Growth: Return on Equity

Super investor Warren Buffett considers return on equity (ROE) the most important measurement of management's performance. Examining and understanding ROE would have uncovered virtually all of the massive corporate frauds. Using case studies, this session illustrates the components of ROE that drive quality earnings growth and influence price-to-earnings multiples, both of which affect investor returns.

Harborview I

Bakul Lalla
Internet Research

If you find the amount of stock research available on the Internet overwhelming, this session is for you! Learn how to keep track of company news, earnings estimates, company fundamentals, and Securities and Exchange Commission (SEC) filings. Gain knowledge about how to track a portfolio. Become aware of a variety of websites providing free information beneficial for your stock studies and portfolio tracking.

Harborview II

Lynn Ostrem
Researching Stocks: The Other 20%

Experienced investors believe a Toolkit stock study covers 80 percent of the information we need to be successful investors. This session introduces the other 20 percent, the

art of digging deeper into the company's history, news, and annual and financial reports. Learn how to assess business models, management, and competitors, and find positive and negative influences that will affect our judgments. Included is an in-depth stock study checklist to use in your own research.

Camden

Matt Willms

Leaky Pipes and Underperforming Stocks

Leaky pipes are similar to chronic underperforming stocks. These underperformers rarely grab our attention because they normally show steady downward trends rather than dramatic dips in performance. Just as an undetected leaky pipe in your home can cause great damage, a leaky stock can result in significant damage to your portfolio. Learn methods to identify and replace these underperforming stocks.

Severn

Ira Smilovitz

Sleep Better with Your Current Portfolio

We are victims of our psychological biases, as well as an imperfect understanding of probability. Both characteristics lead to assigning unwarranted significance to random events and to making inappropriate investment decisions. Learn simple behavioral changes that can improve your returns while lowering your anxiety.

4:00 PM – 4:50 PM

Chesapeake I

Doug Gerlach

Investing in the Blogosphere

Texting while you drive is dangerous, but texting while you invest might be a profitable experience! Learn to use social networking tools such as Twitter and Facebook; Really Simple Syndication (RSS) feeds; and texting services that deliver information easily and quickly. Discover my top picks for investing blogs and keeping on top of content, message boards, and websites in RSS reader programs.

Loch Raven

Seymour Zeenkov

Sensuality and Sectors

The parallels between finding an exciting romance and finding a good stock are remarkably similar. In both cases, your chances improve by starting in the right neighborhoods. For stocks, the right neighborhoods are the sectors. In this session we examine several resources that provide sector information leading to appropriate industries and finally to a choice of likely investment possibilities.

Harborview I

Brad Taylor

Become a Stock Analysis Expert

Dig deeper into the stock study form with advanced methods of analysis. Topics include determining sustainable growth rates, performing alternate calculations of average price to earnings ratios, discovering how potential average return and total return are calculated, and more! These tools provide a means to take your stock analysis to the next level.

Harborview II

Brian Altschul

Dynamics of the Stock Selection Form

Observe how two club members with differing opinions analyze the same stock and reach different conclusions. This beyond-beginners session includes how to apply judgment decisions and how to recognize useful red flags that help improve stock studies.

Camden

Louise Sechler

SSF: A Tool to Help Solve the Investment Puzzle

Puzzled by the stock selection form (SSF)? Learn to dissect and examine all of the pieces of the SSF. Discover the significance of each part, and understand how to evaluate the sections. Combine the pieces to complete the stock analysis puzzle, and learn how to determine if a company is a candidate for your stock portfolio.

Severn

Pam Wilkes

Protect Your Valuable Records BEFORE a Disaster Strikes

Have you been lucky and avoided a burglary, a natural disaster, a computer failure, or misplacing important documents? Are you prepared if a disaster strikes? Maintaining records to ensure you have current and complete documentation stored safely requires a noteworthy commitment. Learn how to keep your information available and secure in a well-organized recordkeeping system.