



Session Descriptions August 7–8, 2010

Sunday Morning, August 8, 2010

9:10 AM – 10:20 AM
Chesapeake I

Bakul Lalla
Discounted Cash Flow

Learn how the discounted cash flow (DCF) model assists you with buy decisions. Gain knowledge about cash flow growth rate assumptions, discount rate, intrinsic value, and margin of safety. Follow a case study that demonstrates how a DCF model is constructed and interpreted.

Loch Raven

Saul Seiberg
Relative Strength: A Helpful Investor's Tool

Relative Strength (RS) is a straightforward though underutilized tool that tells us when a stock of choice is outperforming or underperforming another stock or index. RS can help you compare your stock to its peers and to the overall market. This presentation will also discuss and illustrate the use of performance charts, an expanded form of RS that indicate relative performance for groups of stocks, funds or indices.

Harborview I

Lynn Ostrem
Visual Analysis for the Not-So-Newbie

You've completed a stock study. Now what? Many of us are adept at completing stock studies, but are weak in deciphering the results. Learn to identify a quality company as the instructor guides you through the visual analysis on the stock study form. Analyze growth stocks and business cycles, interpret graphs, estimate growth rates, and learn to use Toolkit's new and undocumented features.

Harborview II

Kathy Floyd
Invest Wisely and Avoid Fraud

No one thinks he or she will be a victim of fraud. However, certain research suggests that if you are college educated, have an above average income, and possess above

average investment knowledge, you fit a profile of people most likely to be a victim of a scam. Learn how to invest wisely and to spot the tactics con artists use.

Camden

Don Cassidy

Learn to Profitably Sell Stock Positions

We never have a profit until we sell, and numerous forces conspire to inhibit selling profitably or selling at all. A personal check list identifies enemies to guard against and provides specific suggestions for selling advantageously. Become better equipped to deal with this important and often neglected second side of every investment position.

10:30 AM – 11:20 AM

Chesapeake I

Doug Gerlach

A Closer Look at Projecting EPS Growth

Projecting future earnings per share (EPS) growth is key to using Toolkit 6 to study stocks successfully. Learn how to find, enter, and interpret analyst long-term growth rates and fiscal year EPS estimates for each of the next five years. Discover how the company's implied growth rate helps ensure that your expectations are reasonable. Understand how to best use Toolkit's various starting point options for your projections and how to estimate EPS based on expected revenue growth.

Loch Raven

John Diercks

Evaluating Management: Understanding ROE

Learn to investigate whether or not management is acting in the best interest of shareholders, especially in turbulent times. Return on equity (ROE) encompasses three basic components that help investors understand if a company is using shareholder equity wisely. Attendees learn to recognize developing ROE trend-related problems in this important financial ratio.

Harborview I

Bob Adams

Putting the Pieces Together

Are you using the entire range of the stock analysis tools available to you? Do you understand the subtleties on the stock selection form? How well do you interpret the management tools? How can you compare companies to determine the best one to choose? Is your portfolio as a whole beating the market averages? Come and see how to put it all together.

Harborview II

Ira Smilovitz

Avoiding Financial Fraudsters

Madoff, Stanford, Schrenker, Cosmo, Forte – a who's who of those involved in financial fraud. Could you fall victim to similar deceit? Learn the five simple signs that indicate you might be susceptible to financial fraud, and become aware of how to protect yourself from fraudsters.

Camden

Jack McCreery

Securities and Exchange Commission Forms

Discover how to find critical information located in Securities and Exchange Commission (SEC) filings. Familiarize yourself with a free tutorial available to help investors learn about executive compensation peer comparisons, legal matters, proxy contests, executive selling, and much more.

11:30 AM – 12:20 PM

Chesapeake I

Saul Seinberg

Stop Loss Orders: Helpful or Harmful?

Stop loss orders can be of significant benefit and great comfort to investors when bad news hits unexpectedly. In addition, they assist in protecting profits and preventing losses when an investor does not have access to a broker or computer. Learn to enhance your comfort level and sleep better at night by increasing your knowledge about stop loss orders, their value, and the reasons their use may or may not be appropriate for your situation.

Loch Raven

Bakul Lalla

Discounted Cash Flow Case Studies

Would you like a second opinion for your stock studies? By way of examples, learn to use discounted cash flow (DCF) models. This session includes how to estimate the intrinsic value of a business based on the present value of expected future cash flow for a given discount rate, as well as advantages and disadvantages of the DCF model as a supplement to your stock studies.

Harborview I

Joe Craig

The Inner Geek's Technology Update

What is cloud computing? What is a service? What is the up-to-the-minute hot feature on the net? Join the Inner Geek to learn new and developing technologies. Check out the latest trends driving advances on the Internet.

Harborview II

Matt Willms

Portfolio Rebalancing Made Simple

For many investors, portfolio rebalancing ranks up there with fertilizing the lawn. You know you need to do it, but you can't get too excited about it. Just as you need to give your lawn a good feeding occasionally, your portfolio needs periodic rebalancing to place your investments back in line with your targeted allocation goals for stocks, bonds, and cash. This session reviews the importance of rebalancing and the steps necessary to accomplish this important portfolio management process.

Camden

Randy Wilkes

Using Good Online Practices

Are you aware of the many dangers of online computing? Do you know how to decrease spam? What do you need to be aware of regarding spyware and adware? Discover how to protect yourself with good online practices and how to avoid identity theft and the pitfalls of not taking measures to protect your computer.