

# InvestEd

Investor Education at Its Best™  
Charlotte, North Carolina  
June 8-10, 2012

## Newbie Program

### Saturday Morning

**9:10 – 9:15** Welcome – Louise Sechler

**9:15 – 10:20**  
**Basic Concepts of Investing**  
**Louise Sechler**

Newbies become successful by learning the principles that guide profitable investors. This session considers an overall strategy for investing and introduces definitions of basic terms used to evaluate a company. Learn the concepts of investing that have worked for many years.

**10:30 – 11:20**  
**Finding Good Candidate Companies**  
**Doug Gerlach**

New investors frequently ask how to find good companies to study. Become aware of the characteristics of quality companies and the warning signs of unsuitable investment candidates. Explore resources to help identify potentially profitable investments.

**11:30 – 12:20**  
**There are Mutual Funds, Too**  
**Pam Wilkes**

Although InvestEd focuses on individual company stocks, mutual funds also are a significant part of most people's investments. Learn about the advantages and cautions of fund investing. The discussion considers the various types and styles of funds, including index funds.

### Saturday Afternoon

**2:30 – 3:10**  
**Embracing the Fundamentals of Stock Selection**  
**Brian Altschul**

In this session, which takes place in the computer lab, Newbies learn the basic characteristics and ground rules used in fundamental investing analysis. Before hands-on activities, these new investors receive an introduction to and definition of unique terms that are key elements of stock studies. Identified and explained simple ground rules facilitate successful stock studies.

**3:20 – 6:00**  
**Hands-on Stock Selection – With Your Hands!**  
**Doug Gerlach**

Use stock analysis software to identify good quality companies selling at reasonable prices in this hands-on session in the computer lab. Participate in a step-by-step process through each section of stock study. A corps of tutors provides assistance to ensure each Newbie understands the process. Following a group stock evaluation, explore the worthiness of several companies of your choice.

### Sunday Morning

**9:10 – 10:20**  
**Judgment with Confidence**  
**Mary Ann Davis**

The stock study software provides an efficient process for evaluating the suitability of a company's stock, but its value to the investor depends on the quality of judgments applied. This session builds on your hands-on computer lab experience and adds to your confidence in developing judgment skills.

**10:30 – 11:20**  
**Internet Research Resources**  
**John Tonsager**

Automatically downloading data from the Internet into your software analysis program is the first step. Learning the unvarnished truth about a company comes next. This session directs you to financial websites showing industry averages and allowing data comparison of companies in the same industry.

**11:30 – 12:20**  
**Develop and Manage Your Portfolio**  
**Brian Altschul**

Learn to design a portfolio based on fundamental investing principles. Gain insights about why diversification decreases risks, and understand how to add diversity to your portfolio. Become acquainted with how active portfolio management enhances the prospects of reward and helps preclude unnecessary losses.

**12:20 – 12:25** Conclusion – Louise Sechler