



## **Session Descriptions**

### **August 7–8, 2010**

**Saturday Morning, August 7, 2010**

**9:10 AM – 10:20 AM**

#### ***Chesapeake I***

**Mary Ann Davis**  
**Selling Covered Calls**

Selling covered calls is a conservative strategy that increases the return on your portfolio. Learn about the basics of options and the advantages and disadvantages of writing covered calls, as well as how covered calls work. Observe a step-by-step approach to getting started. Actual examples demonstrate how covered calls work in real life and how they react to the market.

#### ***Loch Raven***

**Phil Keating**  
**Invest in the Best Companies**

Learn to identify the outstanding characteristics of great growth companies that have thrived 10 to 20 years or longer, even through major bear markets. Identify sources and stock screens for the most promising candidates for long-term investors. Become aware of findings from the past, recent research, and results of very successful long-term investors like Warren Buffett.

#### ***Harborview I***

**Bob Adams**  
**How I Analyze a Company**

Regardless of which stock study analysis software you use, this session is for you. I will demonstrate the steps I use to analyze a company, then go outside the box and use Internet data to confirm judgment decisions. Each section of the stock study form is analyzed and discussed. Learn guideline limits, how to easily use Internet data to support and help guide judgment decisions, and how to recognize when data is within or outside reasonable limits.

## ***Harborview II***

**John Diercks**

### **Value Line's Stock Report**

The ratings and reports section of Value Line includes one-page reports about companies. Information in these reports relates to various entries on the stock study form and to our judgments about the company. This session introduces a company report with background information about many of the ratings considered in stock studies. Learn the wealth of information available to investors on this one-page company report.

## ***Camden***

**Lynn Ostrem, Saul Seinberg, John Tonsager**

### **What's Keeping You From Pulling the Trigger?**

All that research and analysis, and you still cannot make a decision? What's keeping you from pulling the trigger? Join three experienced investors as they explore the most common roadblocks, from fear to analysis paralysis, and share simple solutions to conquer indecision, uncertainty, and a lack of confidence.

**10:30 AM – 11:20 AM**

## ***Chesapeake I***

**Don Cassidy**

### **Introduction to Behavioral Finance**

Investing successfully is not likely if one uses only fundamental analysis. People make up markets and therefore need to understand their own behavioral tendencies under market stress. This session provides new insights from psychology, anthropology, and sociology to help you understand crowd and market action. As a result, you will be able to act more intelligently when buying and selling, rather than simply following the herd.

## ***Loch Raven***

**Bakul Lalla**

### **Spinoffs: Everything You Need to Know**

Does your portfolio include stocks from spinoffs? Have some of your companies spun off part of the company? Learn the reasons companies are motivated to affect a spinoff transaction, and discover how to keep track of spinoffs from the time of announcement to the transaction. Determine how to value spinoffs and how to identify long-term opportunities to profit from spinoffs.

## ***Harborview I***

**Brian Altschul**

### **Identifying Red Flags**

Move to a more sophisticated level of analysis that includes advanced judgment techniques, identification of red flags, and the use of quarterly trend analysis. This

session, geared to investors who are comfortable analyzing stocks, includes examples to illustrate the techniques.

### ***Harborview II***

#### **Phil Sudore Utilizing a Watch List for Industry Study**

We all have a bullpen of stocks to purchase when the time is right. The method used to formulate and structure the list may be different for each individual and each club. This session provides an approach to organizing critical data when building and implementing a watch list of stocks.

### ***Camden***

#### **Seymour Zeenkov Managing, Not Just Monitoring, Your Portfolio**

Have some of the stocks in your portfolio lost their luster? Have some not performed to your expectations? Have some increased in value to such a high price that future price growth is limited? Toolkit 6 automatically alerts you to those stocks needing your attention and provides you with a straightforward process for actively managing and improving your portfolio.

### **11:30 AM – 12:20 PM *Chesapeake I***

#### **Saul Seiberg When Bad Things Happen to Good Options**

You bought or sold an option based on what your research, favorite book or presenter taught you, but the trade has gone wrong. What should you do? What steps can you take to remedy this? Which solution is best for your specific situation and how can you avoid or minimize another poor result?

### ***Loch Raven***

#### **John Diercks Evaluating Management: Dissecting PTP**

Does company management perform in the best interests of shareholders? What is the relationship of sales and expenses to the pre-tax profit (PTP) margin? Learn to recognize developing problems in pre-tax profit margins by studying trends of this important financial ratio.

### ***Harborview I***

#### **John Tonsager Create a Conservative Stock Study**

Gain knowledge about why to change various settings in Toolkit 6. Prepare a conservative stock study that lessens risk and increases potential return. Learn to use revenue-based growth rate estimates to establish realistic future growth rates, and

improve your knowledge about eliminating outliers. Explore ways to create a stock study resulting in a more secure portfolio.

### ***Harborview II***

**Jack McCreery**

#### **A Tour of the SEC Website**

Find the resources available to you from the different divisions of the Securities and Exchange Commission (SEC). Learn how to comment on proposed rules and investigate disciplinary actions taken by the SEC. Discover actions the SEC has taken on a host of high profile issues.

### ***Camden***

**Matt Willms**

#### **Armchair Quarterbacking Your Portfolio**

Are you as good at managing your portfolio as a general manager is at managing a sports team? Dividing your portfolio into groups or squads of all-stars, core starters, and injured or reserve list players accomplishes the task of managing your holdings more easily. This session identifies the characteristics of these three groups using investment Account Manager (IAM) and Toolkit 6 software to recognize when players need repositioning.