



The StockCentral Street Team presents...

Investor Education Workshop

Saturday, January 24, 2009

*Just as every dark cloud has a silver lining, bear markets can offer compelling opportunities. Smart investors use these markets to expand their knowledge and work to improve their portfolios. **Come join us!***

Ramada Minneapolis

6900 Lakeland Avenue North
Brooklyn Park, Minnesota
(Phone) 763-566-8855
www.grandrios.com
(NE corner; I-694 & Hwy. 81)

Class Schedule:

Check-in - 7:30 a.m.
Classes - 8 a.m. – 3 p.m.
Soup & Sandwich Bar
available for lunch - \$7.95

**\$40 Pre-registration;
\$50 at the door**

How to register:

It's easy! Just go to:
www.iclub.com/registerMN
Follow the online directions

**Cyber Café
Website & Software
Demonstrations**

Door Prizes!

AAll and BetterInvesting
members welcome!

8 – 8:50 a.m.

Portfolio-Centered Decision Making

Mark Robertson
Founder & Managing Partner, Manifest Investing, Inc.

9 – 9:50 a.m.

Let's Get Technical: What are the Charts Telling Us?

Lee Wenzel
President, Wenzel Analytics, Inc.

10 – 10:50 a.m.

Secrets of Wall Street Analysts

Doug Gerlach
President, ICLUBCentral Inc.

11 – 11:50 a.m.

Power Screening: Nicholson's Triple Play

Mark Robertson
Founder & Managing Partner, Manifest Investing, Inc.

Noon – 1 p.m.

Lunch Break

1 – 1:50 p.m.

Introduction to Diversification and Asset Allocation

Matt Willms
President, QUANT IX SOFTWARE, Inc.

2 – 2:50 p.m.

Dealing with the Dogs of Your Portfolio

Doug Gerlach
President, ICLUBCentral Inc.

3 – 5 p.m.

Cyber Café and Software Demonstrations

Please join us for this very social after-event!

- Hobnob with the presenters;
- See the websites and software used during the presentations;
- Tap into the local investing scene;
- Meet like-minded investors.

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Guest Presenters and Class Descriptions



Doug Gerlach

President, ICLUBCentral Inc. www.iclub.com and www.stockcentral.com

Author of *Investor's Web Guide*, *The Complete Idiot's Guide to Online Investing*, *The Armchair Millionaire*, *Investment Clubs for Dummies*, and the *BetterInvesting™ Guide to Computerized Investing and the Internet*, Doug has spearheaded ICLUBCentral's new online community website and the stock analysis data service at StockCentral.com. In addition, he is the editor-in-chief of ICLUBCentral's Investor Advisory Service, a newsletter for the long-term investor. Doug has spoken at more than 60 investor education events across the U.S.

Secrets of Wall Street Analysts

How much can you trust Wall Street analysts? Get the inside scoop on what really happens at investment banks and brokerage firms when they say *buy, sell, or hold*. Also, learn the basics of how to build a model to fine-tune your own earnings projections just like analysts do.

Dealing with the Dogs of your Portfolio

Every investor has a stock or two that doesn't live up to their expectations. Should you hold on to these under-performing companies and exercise patience as long-term, buy-and-hold investors are taught? Or should you take action sooner? Learn how to identify problem stocks before they become distressed and discover strategies for knowing when to sell -- and when not to sell.



Mark Robertson

Founder & Managing Partner, Manifest Investing, Inc. www.manifestinvesting.com

Before founding Manifest Investing, Mark served as senior contributing editor for *Better Investing* magazine and has appeared on National Public Radio, CNBC, and ABC to discuss long-term investing. He has worked with *Smart Money*, *Barron's*, *Money* magazine and *The Motley Fool*, and published features in the *Chicago Tribune*. Manifest publishes an e-newsletter focusing on successful long-term investing. The website includes online investment research and screening features for stocks and mutual funds. Additional tools provide resources for portfolio design and management.

Portfolio-Centered Decision Making

Dashboards, windshields, and dipsticks: Portfolio design has many similarities to preparing your car for a long journey. Discover answers to the most challenging questions of portfolio management, including when to sell. We'll show you that your portfolio can tell you what it needs.

Power Screening: Nicholson's Triple Play

In this session, we'll describe NAIC founder George Nicholson's "triple play" – the hunt for stocks with 1. high projected returns; 2. opportunity for increased profitability; and 3. potential for Price Earnings (P/E) expansion. Various screening methods and case studies using the modified Preferred Procedure, or Expected Income Statement, will be demonstrated.



Matt Willms

President, QUANT IX SOFTWARE www.investmentaccountmanager.com

Matt has been involved in the securities and investment business for more than 20 years. In 1985 he formed QUANT IX SOFTWARE, Inc. to develop investment management and record-keeping software. He is also president of The Willms Group, an investment management firm in Mequon, Wisconsin.

Introduction to Diversification and Asset Allocation

When constructing a portfolio, decisions about diversification and asset allocation are important to long-term investing success. This session reviews why investors must consider both taxable and non-taxable investments to obtain a true measure of overall portfolio diversification. The session uses QUANT IX SOFTWARE's Investment Account Manager software program to illustrate how to rebalance a portfolio consistent with diversification and allocation goals.



Lee Wenzel

President, Wenzel Analytics www.wenzelanalytics.com

Lee is a registered investment advisor with a long career in investing and fundamental business analysis, technical patterns and statistical research used in investing. He began consulting in personal finances during the 1970s and has done considerable public speaking and training on personal financial management and investing. He's a favorite speaker within the local American Association of Individual Investors (AAII) community.

Let's Get Technical: What are the Charts Telling us?

Fundamental analysis helps us determine "what" to buy. Technical analysis helps us determine "when" to buy and sell. In this session Lee will identify basic patterns and demonstrate how moving averages can dictate the best time to enter or exit a holding. This class is designed to build your confidence so that you can employ the same techniques at home.

Questions? Contact your local Street Team Leader, Lynn Ostrem – garbagecop@gmail.com – 763-497-5153