



Agenda

GenXchange Investment Club June Meeting / Picnic (Volume IX, Issue 6)

Saturday 14 June 2008, 3:00 PM at Charyl's House in Pearland, TX

Invited Attendees:

v1.0

First and Last Name - Title	First and Last Name - Title	First and Last Name - Title
Tim – President	Michael – Portfolio Manager	Sean – Partner
Greg – Vice President	Shirley – Public Relations	
Charyl – Treasurer/Asst. Secretary	Amalour – Partner	Kimberly (4) - Guest
Christiana – Secretary	Max – Partner	Lizzy (4) - Guest

- ❖ **Organization & Operations - Tim**
 - Attendance.
 - Review June agenda.
 - Discuss fees.
- ❖ **Finance - Charyl**
 - Collect contributions (\$25 minimum).
 - Discuss using unique penny values on checks as well as direct deposits for each member.
 - Binder check and direct deposit review.
 - Finance announcements and discussion.
- ❖ **Education – Greg**
 - Educational Presentation – Corporate Balance Sheets (Tim).
 - Educational Presentation – Corporate Statement of Cash Flow (Michael).
 - Education announcements and discussion.
- ❖ **Portfolio Management – Michael**
 - Stock presentations
 - Shepherd Stocks – BBBY (Shirley), SII (Sean), WMT (Greg), JNJ (Mike)
 - Watch Stocks – SYU (Tim), PAYX (Charyl), INFY (Max)
 - Team Presentation – None.
 - Prospective member presentation (Kimberly).
 - Prospective member presentation (Lizzy).
 - Portfolio Management announcements and discussion.
- ❖ **Public Relations – Shirley**
 - Confirm reservation of La Madeleine meeting location for July.
 - Public Relations announcements and discussion
- ❖ **Next Month - Tim**
 - July Educational Presentation – Developing Nations: Impact of developing nations (Sean).
 - July Shepherd Stocks – CSCO (Max), ITW (Tim), T (Michael).
 - July Stock Watch – FDS (Greg).
 - July Team Presentation – Ewoks (Max/Shirley/Cris).