



GenXchange Investment Club March Agenda (Volume X, Issue 03)

Tuesday 10 March 2009, 7:00 PM at La Madeleine 10001 Westheimer

Invited Attendees:

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First and Last Name – Title	First and Last Name – Title	First and Last Name - Title
Charyl – President / Assistant Treasurer	Max – Portfolio Manager	Cris – Partner
Greg – Vice President	Shirley – Public Relations	Michael – Partner
Sean – Treasurer	Tim – Secretary / Web Update	Amalour – Partner

❖ **Organization & Operations - Charyl**

- Attendance
- Bylaw Changes (written proposal)

❖ **Finance - Sean**

- Collect Contributions (\$25 minimum)
- Fees Update

❖ **Education – Greg**

- Educational Presentation – SSG Sections 2 & 3 – Tim
- Educational Presentation – SSG Sections 4 & 5 – Cris
- Assign Group SSG
- Education announcements and discussion.

❖ **Portfolio Management – Max**

- Stock presentations
 - Shepherd stocks – JNJ (Shirley), WRLD (Sean), WMT (Greg), BBBY (Tim), SII (Max)
 - Missed Stocks February – CSCO (Cris), DHR (Amalour), SCHW (Sean), SYY (Mike)
 - Stock Watch – INFY (Cris), PAYX (Amalour)
 - Team Presentation – Handmaidens (Charyl & Amalour) -
 - eBay (Sean & Max)
- Portfolio Management announcements and discussion.

❖ **Public Relations – Shirley**

- Public Relations announcements and discussion

❖ **Administrative – Tim**

- Web Updates

❖ **Coming Soon - Charyl**

- Presentation – Group SSG DUE 04/07/09
- Shepherd Stocks – FDS, CSCO, ITW, T
- Stock Watch – None
- Team Presentation – Rebels (Tim, Cris, Mike)