



GenXchange Investment Club April Agenda (Volume X, Issue 04)

Tuesday 14 May 2009, 7:00 PM at La Madeleine 10001 Westheimer

Invited Attendees:

v 1.0

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, Proxy	Amalour – Partner, Proxy

❖ **Organization & Operations - Charyl**

- Attendance
- Summer Picnic Date / Plan

❖ **Finance - Sean**

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

❖ **Education – Greg**

- Corporate, Municipal, U.S. Bonds - Sean
- Education announcements and discussion.

❖ **Portfolio Management – Max**

- Stock presentations
  - Shepherd stocks – HRS (Cris), SCHW (Charyl, DHR (Amalour)
  - Stock Watch – None
  - Team Presentation – Magic Jack(Greg / Shirley)
  - eBay (Sean & Max) – Just kidding ☺
- Portfolio Management announcements and discussion
  - Updated Watch list posted to Bivio – Max

❖ **Public Relations – Shirley**

- Public Relations announcements and discussion

❖ **Administrative – Tim**

- Web Updates

❖ **Coming Soon - Charyl**

- Presentation – Wills & Estate Planning - Shirley
- Shepherd Stocks – JNJ, WRLD, WMT, BBBY, SII, INFY
- Stock Watch – SYY, PAYX, EBAY
- Team Presentation – Stormtroopers (Max / Sean)