



GenXchange Investment Club June Agenda (Volume X, Issue 07)
 Sunday 05 July 2009, 2:00 PM at Charyl's House in Pearland

Invited Attendees:

v 1.1

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 Updates	Amalour – Partner

- ❖ **Organization & Operations - Charyl**
 - Attendance
 - Back-Up CDs and Archive of data – Status
 - New Assignment Sheet - Tim

- ❖ **Finance - Sean**
 - Collect Contributions (\$25 minimum)
 - Fees Update – Chart?

- ❖ **Education – Greg**
 - Education announcements and discussion
 - Update calendar in Assignment
 - Charyl will do Getting Out of Debt in October

- ❖ **Portfolio Management – Max**
 - Stock presentations
 - Shepherds – T (Tim), (Max), ITW (Mike)
 - Stock Watch – MTW (Greg)
 - Team Presentation – None
 - Portfolio Management announcements and discussion

- ❖ **Public Relations – Shirley**
 - Public Relations announcements and discussion

- ❖ **Administrative – Tim**
 - Web Updates

- ❖ **Coming Soon - Charyl**
 - August Meeting @ La Madeleine
 - Presentation – Wills & Estate Planning – Shirley
 - Shepherd Stocks – HRS, SCHW, DHR
 - Stock Watch – None
 - Team Presentation – August – Stormtroopers (Max / Sean)