



GenXchange Investment Club August Agenda (Volume X, Issue 08)

Tuesday 11 August 2009, 7:00 PM at La Madeleine

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 Updates	Amalour – Partner

- ❖ **Organization & Operations - Charyl**
 - Attendance
 - Back-Up CDs and Archive of data – Complete

- ❖ **Finance - Sean**
 - Collect Contributions (\$25 minimum)

- ❖ **Education – Greg**
 - Education announcements and discussion
 - Wills & Estate Planning – Shirley

- ❖ **Portfolio Management – Max**
 - Stock presentations
 - Shepherds – HRS (Cris), SCHW (Charyl), DHR (Amalour)
 - Stock Watch – MTW (Greg)
 - Team Presentation – Stormtroopers (Max & Sean)
 - Portfolio Management announcements and discussion

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

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

- ❖ **Coming Soon - Charyl**
 - September Meeting @ La Madeleine
 - Presentation – Online Resources for Consumer Debt & Savings – Amalour
 - Getting Out of Debt - Charyl
 - Shepherd Stocks – JNJ, WRLD, WMT, BBBY, SII, INFY
 - Stock Watch – eBay
 - Team Presentation – Handmaidens (Charyl / Amalour)