

# Agenda

**Business:** GenXchange Investment Club

**Purpose:** November Meeting (Volume X, Issue 12)

**Proposed Date and Time:** 5 December 2009, 3:00 PM

**Location:**

**Invited Attendees:**

First and Last Name – Title	First and Last Name – Title	First and Last Name - Title
Charyl – President	Tim – Secretary	Amalour - Partner
Greg – Vice President	Max – Portfolio Manager	Mike - Partner
Sean – Treasurer	Shirley – PR	Christiana - Partner
	Jose - Guest	

❖ **Organization & Operations**

- Attendance
- Review December agenda, Assign Assignment Sheet for 2010
- Transfer Binders
- Stars, Rewards, Reimbursements Due By 12/15

❖ **Finance**

- Collect contributions (\$25 minimum)
- Quarterly Individual Reports - **Treasurer**

❖ **Portfolio Management**

- Portfolio Manager's Report
- Stock presentations
  - Shepherd Stocks - JNJ (Cris), WRLD (Sean), WMT (Shirley), BBBY (Greg), SII (Tim), INFY (Max)
  - Stock Watch – MDT (Mike)

❖ **Education**

- Give topic ideas for next year to Cris

❖ **Public Relations**

- Gift Exchange

❖ **Next Month**

- Sign Documents
- Assign New Education & Teams
- Pay Annual Dues
- Feb – Assign Audit
- Feb – Budget