



Business: GenXchange Investment Club Agenda

Purpose: July Meeting (Volume XI, Issue 7)

Proposed Date and Time: 13 July 2010, 7:00 PM

Location: La Madeleine; 10001 Westheimer

Invited Attendees:

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

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❖ **Organization & Operations**

- Attendance
- Review July agenda
- Mentor Program Progress

❖ **Finance**

- Collect contributions (\$25 minimum)
- Status of Direct Deposits

❖ **Portfolio Management**

- State of the Union
- Stock presentations
 - Shepherd Stocks – AMSG (Jose), T (Tim), FDS (Max), PETS (Amalour)
 - Stock Watch – None
 - Team Presentation – Stormtroopers (Max & Sean)

❖ **Education**

- American Depositary Receipts (ADRs) – Greg

❖ **Next Month**

- Shepherds – BMY (Sean), HRS (Cris), SCHW (Charyl)
- Watched – None
- Team – Rebels (Jose & Mike)
- Education – Inflation & Investments - Sean