



Agenda

GenXchange Investment Club April Meeting (Volume XVI, Issue 4)

Wednesday 8 April 2015, 7:00 PM at La Madeleine on Westheimer, Houston, TX

Invited Attendees:

v1.0

First and Last Name – Title	First and Last Name – Title	First and Last Name - Title
Liz – President	Tim – Secretary/Asst. Treasurer	Charyl – PR
Max – Vice President	Mike – Webmaster	Cris – Portfolio Manager
Patrick – Treasurer		

❖ Organization & Operations - Liz

- Attendance.
- Review April agenda.
- Review March meeting notes.
- Sign Documents
- Discuss membership.
- Discuss fees.
- Domain name & cost

❖ Finance – Mike & Patrick

- Collect contributions (\$25 minimum).
- Annual fee of \$75 per person
- Binder check exchange
- Finance announcements and discussion.

❖ Portfolio Management – Patrick & Cris

- Stock presentations
 - Shepherd stocks – AMSG (Tim), WSO (Max), LKQ (Cris), VZ (Liz), BBBY (Charyl), AAPL (Charyl)
 - Stock Watch – AKAM (Cris), NVO (Max)
 - Team Presentation – Team 3 (Liz & Max)
- Portfolio Management announcements and discussion

❖ Education – Max

- Educational Presentation – Max
- Education announcements and discussion.

❖ Public Relations – Cris & Charyl

- Confirm reservation of La Madeleine meeting location for May 13, 2015.
- Public Relations announcements and discussion.

❖ Webmaster – Charyl & Mike

- Discuss GenXChange.com.
- Discuss Bivio clean up.

❖ Next Month - Liz

- May Educational Presentation – Patrick (Energy)
- May Shepherd Stocks – FLO (Mike), GMCR (Patrick)
- May Stock Watch – AKAM (Cris), NVO (Max)
- May Team Presentation – Charyl, Tim, Patrick