



# Agenda

## GenXchange Investment Club May Meeting (Volume XVI, Issue 5)

Wednesday 13 May 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		Benita - Guest Vanitha - Guest

### ❖ Organization & Operations - Liz

- Attendance.
- Review May agenda.
- Review April meeting notes.
- Sign Documents
- Discuss membership.
- Discuss fees.

### ❖ Finance – Patrick

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

### ❖ Portfolio Management – Cris

- Stock presentations
  - Shepherd stocks – FLO (Mike), GMCR (Patrick), AMSC (Tim) - news
  - Stock Watch – AKAM (Cris), NVO (Max)
  - New Team member presentations – Benita & Vanitha
  - Team Presentation – none
- Portfolio Management announcements and discussion

### ❖ Education – Max

- Educational Presentation – Max
- Education announcements and discussion.

### ❖ Public Relations – Cris

- Confirm reservation of La Madeleine meeting location for June 10, 2015.
- Public Relations announcements and discussion.

### ❖ Webmaster – Mike

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

### ❖ Next Month - Liz

- June Educational Presentation – Patrick (Energy)
- June Shepherd Stocks – BBY-Charyl, MA-Patrick, ORCL-Liz, CTSH-Tim
- June Stock Watch – DRQ-Liz, TXRH-Mike
- June Team Presentation – Team 1 (Charyl, Tim, Patrick)