



# Agenda

## GenXchange Investment Club May Meeting (Volume XVI, Issue 10)

Wednesday 11 Nov. 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 / Portfolio Manager	Charyl – PR
Max – Vice President	Mike – Webmaster/ Asst. Treasurer	Benita – Asst. Secretary
Patrick – Treasurer	Cris – Activate	

### ❖ Organization & Operations - Liz

- Attendance.
- Review Nov. agenda.
- Review Oct. meeting notes.
- Discuss fees

### ❖ Finance – Max

- Collect contributions (\$25 minimum).
- Quarterly Reports
- Max – reimbursement & annual fee fix?
- Max – fully updated on treasurer duties?
- Bivio service – Liz paid – credit her account?
- Bharat – account set up? Cancel acct
- Better Investing books purchased by Tim – reimbursed?

### ❖ Secretary – Tim

- Quarterly Reports

### ❖ Portfolio Management – Tim

- Portfolio Management announcements and discussion
- Stock presentations
- Shepherd stocks – FLO-Mike, GMCR-Patrick, GILD-Cris, AKAM-Benita
- Stock Watch – NVO-Max
- Team Presentation – Team 1 – Charyl, Tim

### ❖ Education – Patrick

- Educational Presentation – Tim–Telecom & Industrial-Liz
- Education announcements and discussion.

### ❖ Public Relations – Charyl

- Public Relations announcements and discussion.

### ❖ Webmaster – Mike

- Discuss GenXChange.com.

### ❖ Next Month - Liz

- Xmas party at Max's house - Sunday, December 6. Traditional turkey dinner- GIFT EXCHANGE- \$20 no gift cards include receipt, spouses & kids welcome- BYOB