



Agenda

Business : **GenXchange Investment Club**
Purpose : **February Meeting (Volume VII, Issue 2)**
Date and Time : 13 March 2007, 7:00 PM
Location : La Madeleine on Westheimer

Invited Attendees:

v2.0

First and Last Name – Title	First and Last Name – Title	First and Last Name - Title
Tim – President	Jason – Portfolio Manager	Max - Partner
Brian – Vice President	Charisse – Public Relations	Michael – Partner
Charyl – Treasurer / Asst. Secretary	Cynthia– Partner	
Christiana – Secretary	Greg - Partner	Sean Butler - Guest

- ❖ **Organization & Operations - Tim**
 - Attendance
 - Review March agenda
 - Discuss Officers meeting
 - 2007 Budget

- ❖ **Finance - Charyl**
 - Collect contributions (\$25 minimum)
 - Remind members to pickup K1 online.
 - Review club audit.
 - Binder check status.
 - New valueline reseach.
 - Finance announcements and discussion.

- ❖ **Administrative - Cris**
 - Quarterly reports.

- ❖ **Education - Brian**
 - Educational presentation – Sources for Business News (Max).
 - April Educational presentation – Investing in Commodities (Tim).
 - Education announcements and discussion.

- ❖ **Portfolio Management – Jason**
 - Stock presentations
 - Shepherd stocks – ORLY (Charyl), WMT (Jason)
 - Stock Watch - SY Y (Tim) – Assign XOM to partner.
 - Team Presentation – Greg & Mike (Sith)
 - Portfolio Management announcements and discussion.

- ❖ **Prospective Member Presentation – Sean**
 - Stock presentations
 - Paperwork
 - Vote