



Agenda

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

Tuesday, 10 April 2007, 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
Tim – President	– Portfolio Manager	Cynthia– Partner
Brian – Vice President	Charisse – Public Relations	Greg - Partner
Charyl – Treasurer / Asst. Secretary		Max - Partner
Christiana – Secretary		Michael – Partner

- ❖ **Organization & Operations - Tim**
 - Attendance
 - Review March agenda
 - Discuss fees (Tim – Late Agenda).
 - Vote on new Portfolio Manager.
- ❖ **Finance - Charyl**
 - Collect contributions (\$25 minimum) -
 - Remind members to prepare taxes by April 17 – required with a K1.
 - Binder check status (return Jason's check).
 - First quarter reports.
 - Finance announcements and discussion.
- ❖ **Administrative - Cris**
 - First quarter reports.
- ❖ **Education - Brian**
 - Presentation – Better Investing meeting (Charisse).
 - April Educational presentation – Investing in Commodities (Tim).
 - Education announcements and discussion.
- ❖ **Portfolio Management – Greg**
 - Stock presentations
 - Shepherd stocks – JNJ (Mike), CSCO (Max)
 - Stock Watch - ARG (Greg), WAG (Cynthia), XOM (Brian).
 - Team Presentation – Max (Ewok)
 - Portfolio Management announcements and discussion.
- ❖ **Public Relations – Charisse**
 - Update Assignments (Remove ROCK, replace assignments for Jason – WAG and ADP).
- ❖ **Next Month - Tim**
 - May Educational presentation – REITs (Charyl).
 - May Shepherd stocks – HRS (Charisse), SCHW (Brian)
 - May Stock Watch – TCTO (Mike), ADP (?)
 - May Team Presentation – Charisse & Charyl (Jedi)