



Agenda

GenXchange Investment Club April Meeting (Volume VII, Issue 5)

Tuesday, 8 May 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	Michael – Portfolio Manager	Cynthia– Partner
Brian – Vice President	Charisse – Public Relations	Greg - Partner
Charyl – Treasurer / Asst. Secretary		Max - Partner
Christiana – Secretary		

❖ Organization & Operations - Tim

- Attendance
- Review May agenda
- Discuss fees (Tim – Late Agenda).

❖ Finance - Charyl

- Collect contributions (\$25 minimum)
- Discuss alternate club accounting sites (Myiclubs renewal due June 4th).
- Binder check status.
- Finance announcements and discussion.

❖ Education - Brian

- May Educational presentation – REITs (Charyl)
- Education announcements and discussion.

❖ Portfolio Management – Michael

- Stock presentations
 - Shepherd stocks – HRS (Charisse), SCHW (Brian)
 - Stock Watch TCTO (Mike)
 - Team Presentation – Charisse & Charyl (Jedi)
- Assign Stock Shepherd for ITW
- 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 – How to read an Annual Report (Charisse)
- May Shepherd stocks – ORLY (Charyl), WMT (Greg)
- May Stock Watch – SYY (Tim), ADP (Christiana), PAYX (Cynthia)
- May Team Presentation – Tim & Brian (The Emperor & Darth Vader)