



Agenda

GenXchange Investment Club September Meeting (Volume VII, Issue 9)

Tuesday, 11 September 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	Christiana – Secretary	Greg - Partner
Brian – Vice President (Proxy)	Michael – Portfolio Manager	Max - Partner
Charyl – Treasurer/Asst. Secretary	Charisse – Public Relations	Shirley - Guest

❖ **Organization & Operations - Tim**

- Attendance
- Review September agenda
- Officer Binder review.
- Set up Bylaw committee.
- Announce October officer nominations.
- Discuss fees.

❖ **Finance - Charyl**

- Collect contributions (\$25 minimum)
- Binder check status
- Establish deadline for updating personal information on Bivio
- Discuss IRS tax issue
- Finance announcements and discussion.

❖ **Education - Brian**

- ETF Contest standings.
- September Educational presentation – Energy Beyond Crude Oil (Christiana)
- Education announcements and discussion.

❖ **Portfolio Management – Michael**

- Stock presentations
 - Shepherd stocks – ORLY (Charyl), WMT (Greg), BBBY (Cynthia)
 - Stock Watch - SYU (Tim), PAYX (Cynthia), ADP (Christiana)
 - September Team Presentation – Sith (Greg & Michael)
- Prospective member stock presentation – (Shirley)
- Portfolio Management announcements and discussion.

❖ **Public Relations – Charisse**

- Public Relations announcements and discussion

❖ **Next Month - Tim**

- October Educational presentation – Retirement Calculators (Greg).
- October Shepherd stocks – JNJ (Michael), CSCO (Max), ITW (Tim)
- October Stock Watch – None.
- October Team Presentation – Ewoks? (Max & Christiana)