



NAIC NY Chapter

**Better
Investing**

Education Fair

Saturday, June 21, 2003

8:30a.m. to 4:30p.m.



Presented by the New York Chapter National Association of Investors Corporation

EDUCATION FAIR SCHEDULE

8:30am – 9:15am	Registration
9:15am – 11:45am	Classes (Session 1)
11:45am – 1:00pm	Lunch (box lunch included in registration)
1:00pm – 2:45pm	Classes (Session 2)
2:45pm – 4:30pm	Classes (Session 3)

Location: The Floral Park Community Church
120 Floral Parkway, Floral Park, L.I.

Directions:

- Long Island Expressway (I-495) East
- Take Exit 30S- toward EAST HAMPTON BLVD/CROSS ISL PKWY SOUTH/GRAND CENTRAL PARKWAY.
- Stay straight to go onto HORACE HARDING EXWY South
- Turn SLIGHT RIGHT onto W ALLEY RD.
- Merge onto CROSS ISLAND PKWY South toward VERRAZANO BR.
- Take Exit 27E toward RT-25/JERICHO TPKE EAST and merge onto JAMAICA AVE.
- Turn SLIGHT RIGHT onto TULIP AVE.
- Turn RIGHT onto PLAINFIELD AVE.
- Turn LEFT onto FLORAL PKWY.

Church is located on a triangle - Floral Parkway/Cherry St./Cedar St.

Enter the building from the side door on Cedar Street.

(All street signs still refer to former church name: The Evangelical Covenant Church of Floral Park)

Registration Fees (including box lunch):

- \$35 non-NAIC member
- \$30 NAIC member
- \$25 per NAIC member - when three or more members of an NAIC club register at the same time

Contacting the New York Chapter

Voice-Mail: (718) 856-8462

Web Page: <http://old.better-investing.org/regions/newyork.html>

Chapter E-mail Address: NY-NAIC@better-investing.org

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Class Descriptions

Full Day Session (Session 1, 2 and 3)

Beyond Beginners: Improving Judgment: Based on the successful workshop presented at NAIC Congress 2002 in Portland. This class looks at studying a company beginning with the basics and looking at each section of the Stock Selection Guide. – Led by Avi Horwitz

Session 1 Choices

SSG Bloopers: This session will look at common judgment errors on the Stock Selection Guide with an eye toward improving the logic of your stock study judgment. – Led by Monica Noel

Mutual Funds (An Overview): This course will introduce Mutual Fund concepts and the NAIC tools available to improve your study of funds. This class is also ideal for those who wish to improve their 401K plan selections. – Led by Michael Fiorillo

Session 2 Choices

Analyzing Banks and Insurance Companies: This session will focus on the special issues in analyzing banks and insurance companies using NAIC's Stock Selection Guide. – Led by Joe Smith

Club Operations: This session will look at issues involved in properly starting and properly running a successful investment club. – Led by Monica Noel

Session 3 Choices

Basic Portfolio Management: So you own four or five stocks, what do you do next? This class will look at beginning portfolio management using Investors Toolkit. – Led by Joe Smith

For Presidents Only: This session targets club presidents. It is an opportunity to meet and discuss club issues with other club presidents and with NAIC experts. – Led by Monica Noel

Special Guest Instructor-Joe Smith: Joseph F. Smith has served as president of both the Philadelphia (now Delaware Valley) and the New Jersey Chapters of NAIC. As a founding partner of TriState Investors, a 35-year-old investment club based in New Jersey, Joe currently serves as its Vice President and Portfolio Manager. Joe currently uses both of NAIC's software packages – Toolkit and STB Stock Analyst – to analyze current holdings, prospective new additions and overall management of the club's extensive portfolio. Over the years, Joe has conducted numerous workshops at NAIC's National Congress and, in 1998, was honored as an O'Hara Award recipient for services rendered to investment clubs and individual investors in New Jersey. Joe is currently an assistant director on the NIA Board.



Education Fair Registration Coupon

NAIC membership is not required

PLEASE REGISTER BY COMPLETING THE ENCLOSED REGISTRATION COUPON AND MAILING IT WITH YOUR CHECK OR MONEY ORDER TO:



New York Chapter NAIC
c/o Lillian Heard
137-22 Southgate Street
Springfield Gardens, NY 11413

Telephone: (718) 723-4360

*Join us for great
Door Prizes!!!*

YOUR CANCELED CHECK IS YOUR RECEIPT

(PLEASE PRINT ALL INFORMATION LEGIBLY)

NAME: _____ **DAYTIME PHONE:** _____

ADDRESS: _____ **EVENING PHONE:** _____

CITY: _____ **STATE:** _____ **ZIP:** _____

NAIC MEMBERSHIP#: _____ **CLUB NAME:** _____

EMAIL ADDRESS: _____ @ _____

Enclosed is \$ _____ representing registration for _____ person(s).

Please indicate your seminar choice(s):

_____ Beyond Beginners: Improving Judgment

OR

Session 1 (Select one)

and

Session 2 (Select one)

and

Session 3 (Select one)

_____ SSG Bloopers

_____ Analyzing Banks & Insurance Companies

_____ Basic Portfolio Management

-or-

-or-

-or-

_____ Mutual Funds

_____ Club Operations

_____ For Presidents Only

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