



NAIC NY Chapter

Better
Investing

Education Fair



Saturday, November 22, 2003

9:00a.m. to 4:00p.m.

Presented by the New York Chapter National Association of Investors Corporation

EDUCATION FAIR SCHEDULE

9:00am – 9:30am	Registration
9:30am – 11:50am	Classes (Session 1)
11:50am – 12:30pm	Lunch (box lunch included in registration)
12:30pm – 2:10pm	Classes (Session 2)
2:20pm – 4:00pm	Classes (Session 3)

LOCATION: ST. THOMAS AQUINAS COLLEGE
125 Route 340, Sparkill, New York 10976-1050

From New York City via the George Washington Bridge: Bear right crossing the bridge following signs to Palisades Interstate Parkway. Travel on the Palisades Parkway to Exit 5 (Sparkill - Route 303 North). Bear right coming off the ramp and go North on Route 303 to the first traffic light. Turn right on Route 340. The College is approximately ½ mile on the left.

From Westchester or Connecticut via the Tappan Zee Bridge: Travel on the New York Thruway to Exit 12. Bear right coming off the ramp and travel south on Route 303 about 4 miles to Route 340. Turn left on Route 340. The College is about ½ mile on the left.

From Albany area: Take the New York State Thruway to exit 12. Follow directions above. St. Thomas is less than 2 hours from Albany, NY.

From Bergen County: Follow directions as above via Palisades Interstate Parkway or take Livingston Street from Northvale which changes into Route 303, and follow as above.

Registration Fees (including box lunch):

- \$45 non-NAIC member
- \$40 NAIC member
- \$35 per NAIC member - when three or more members of an NAIC club register at the same time

Special Guest Instructor-Joe 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 a Vice President of the New Jersey Chapter and an Associate Director of the NIA Board.



Special Guest Instructor-Rich Beaubien: (Vice president of NAIC Products, ICLUBcentral, Inc.) An engineer trained at UMass and MIT, Rich joined ICLUBcentral after several years managing product design teams at Cisco. A long-time investment club enthusiast, Rich has served as president of the NAIC Massachusetts Chapter and as Associate Director of the NAIC Computer Group. Rich teaches frequently at local and national NAIC events and belongs to multiple investment clubs, including one of the first to operate entirely online. Rich has been an NAIC member since the late 1980s, and is a charter member of the NAIC Massachusetts Chapter Computer Group. He is currently an adviser to the NAIC Massachusetts Chapter.



Class Descriptions

Full Day Session (Session 1, 2 and 3)

Beyond Beginners: Improving Judgment: (Advanced Beginner/Intermediate) 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

Mutual Funds (An Overview): (Beginner) 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

SSG Bloopers: (Intermediate/Advanced) 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

Screening for Stocks (Prospector): (Computers) This class will introduce the fundamental concepts of stock screening. We'll find out how to uncover great stocks using the powerful NAIC Stock Prospector with OPS, and even look at a couple of free Internet screening sites. – Led by Rich Beaubien

Session 2 Choices

Data Resources: (Beginner) Learn how to find information about a company in order to evaluate it as a prospective profitable investment. Resources include Value Line, newspapers, TV, radio, the Internet, and financial publications. Value Line will be the main data resource. - Led by Phyllis Pawlovsky

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

A Club Accounting Clinic: (Computers) Tailored to the audience, you will take it where you need to go: online or desktop, from the basic to the advanced. We'll cover and answer all types of Club Accounting tips, tricks, and concepts. - Led by Rich Beaubien

Session 3 Choices

Club Operations: (Beginner) This session will look at issues involved in properly starting and properly running a successful investment club. It is an opportunity to meet and discuss club issues with other club members and with NAIC experts. - Led by Monica Noel & Michael Fiorillo

Ten-Minute Checklist for Screening: (Intermediate/Advanced) This class will look at the quick analysis format developed to help find companies worth studying further. - Led by Brunilda Fernandez

Basic Portfolio Management: (Computers) 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

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

*Coffee & Donuts!
Box Lunch Included!
Door Prizes!*

YOUR CANCELLED 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 (Full Day)

-OR-

Select one class from each session (Please check one class in each column)

SESSION 1

SESSION 2

SESSION 3

Mutual Funds

Data Resources

Club Operations

SSG Bloopers

Analyzing Banks & Insurance
Companies

Ten Minute Checklist for Screening

Screening for Stocks (Prospector)

A Club Accounting Clinic

Basic Portfolio Management

Online Registration is Coming to the NY Chapter SOON! By the time this is in your hands, the New York Chapter should be able to take registration online using your credit card. We will be processing through Paypal so that your credit card information is kept private. Please check our webpage for further details. <http://www.better-investing.org/chapter/newyork>