

6th ANNUAL INVESTOR EDUCATION FAIR 2020

OUR SPEAKERS



Suzi Artzberger
BetterInvesting Headquarters



Nick Stratigos



Ron Bryun
San Diego, CA



Olivia Ewing, CFP
Edward Jones



Cy Lynch
Atlanta, GA

A Virtual Experience



AUGUST 27, 28 & 29TH
Live and On Demand sessions

20/20 Vision For Better Investing

This all virtual event will provide sessions that will
*Foster The Growth Of Investing Through Relevant Education,
Innovation & Collaboration*

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6TH ANNUAL EDUCATIONAL VIRTUAL FAIR SCHEDULE
August 27-29, 2020

THURSDAY, AUGUST 27th, 2020 5:30 PM EDT AND 7:30 PM EDT

5:30 PM EDT	Olivia Ewing	Retirement and Making Your Money Last Social Security: Your Questions Answered REGISTER	Have you retired recently? Are you planning to retire soon? This presentation discusses ideas to help build a reasonable and sustainable strategy for managing income and expenses during retirement. We will explore how to address key concerns such as inflation, health care expenses and market volatility as well as ways to prepare for things that may not go as expected. <i>Length: 35 minutes</i>
7:30 PM EDT	Olivia Ewing	Time Matters; A Woman’s Outlook on Retirement <i>Audience: Women ages 50–70</i> REGISTER	This program shares perspectives on financial concerns facing women who are getting ready for or have recently transitioned to retirement. It discusses retirement income strategies, including perspectives around Social Security, withdrawal, and reliance rates. It also addresses how to prepare for the unexpected, including market and inflation risks, and the rising costs of health care and long-term care. <i>Length: 50 minutes</i>

FRIDAY, AUGUST 28th, 5:30 PM EDT AND 7:30 PM EDT

5:30 PM EDT	Cy Lynch	Investing in Turbulent Times: Preparing for the Inevitable Bear – Advanced REGISTER	We will first review past market cycles, concentrating on the last two bull/bear cycles. Then using a lesson learned approach, we will explore specific portfolio management techniques to help maximize gains in up markets, while minimizing them in down ones. Specific topics will include finding projected return for the market, using it to guide portfolio management, selling overpriced stocks and when holding cash is ok.
5:30 PM EDT	Suzi Artzberger	Historical Growth and Company Management – Beginner REGISTER	Think you have fallen in love with a potential investment? Do not waste time trying to do an SSG on a company that does not have growth or great management. We will review guidelines when doing a visual analysis of sales and earnings for your company and evaluating company quality to make these SSG sections easier.
5:30 PM EDT	Ron Bruyn	Eight Key Important Factors – Intermediate REGISTER	We will discuss the Eight Key Factors that are most important to the fundamentals of a company before making an investment. Is the company firing on all its eight cylinders and is the company maximizing its strengths to stay ahead of the competition? We shall examine these eight factors so it will give you a better understanding of sharpening your skills and making better decisions.
7:30 PM EDT	Suzi Artzberger	Forecasting Sales and Earnings – Beginner REGISTER	Confused about how to forecast or estimate sales or earnings? The guidelines we learn here will help keep you grounded and out of trouble. Tips and research ideas from the CoreSSG and SSGPlus tools to support your forecasts will also be presented.
7:30 PM EDT	Nick Stratigos	Sell Signals – Intermediate REGISTER	The Stock Selection Guide (SSG) teaches us how to interpret the fundamentals of a company to determine what stocks to buy and when. Fundamental analysis also applies to our sell decisions. In this session, the top criteria to consider before selling a stock

			are identified and explored. Both signals on our SSG and other signals not found on the SSG will be discussed.
7:30 EDT	Cy Lynch	Total Return vs. The Upside/Downside Ratio – Intermediate REGISTER	Total return and the Upside/Downside (U/D) Ratio are two of the metrics on the Stock Selection Guide (SSG) traditionally viewed as relating to a stock's potential value. In this class, Cy will explain why using the U/D ratio as a measure of stock value or risk is misleading at best and detrimental to your investing success at worst. We'll then examine how to maximize your return by focusing on projected total return both for individual stocks and your portfolio as a whole.

SATURDAY, AUGUST 29th 1:00 PM EDT AND 3:00 PM EDT

1:00 PM EDT	Suzi Artzberger	Evaluating Future Stock Prices – Beginner REGISTER	In this segment we will review guidelines for evaluating the historical high and low P/E's, determining potential high and low prices and evaluating the company's potential return in the context of the investment itself and your overall portfolio.
1:00 PM EDT	Nick Stratigos	Finding Your Next Portfolio Gem: Screening for Stocks to Study – Beginner REGISTER	How do you identify the next stock that will meet your portfolio needs? Screening will lead you to the answer. In this course, we will define what stock screening is and how to create a good quality screen. We will use BetterInvesting Screening tools, Manifest Investing tools and identify other free resources available to screen for the next Gem for your portfolio.
1:00 PM EDT	Ron Bruyn	The Long Runway – Advanced REGISTER	As investors, it is easy to overlook traps such as Profit, Loss and Debt. We get so caught up in the latest equations and analysis that we forget the concepts that makes a company succeed. You must have strict rules if you genuinely want to protect your investments. To be successful, you must buy a stock with the best chance to appreciate and have it compound in your portfolio.
3:00 PM EDT	Ron Bruyn	Successful Investing for beginners REGISTER	This class is an excellent primer for beginning investors. It chronicles the step-by-step process of successful investing. It will explain the pros and the cons of stock investing. It will also expose you to other choices of investments. With the right learning, you can gain the knowledge in how to invest with care and confidence.
3:00 PM EDT	Cy Lynch	Ways to use Manifest Investing and Other Sources with our SSG – Intermediate REGISTER	While the Stock Selection Guide (SSG) helps us focus on what really matters when it's easy to be overloaded with investing information and data, let's not miss ways to supplement and improve our SSG analysis. Join Cy as he shares tips on using ManifestInvesting.com, Value Line and Morningstar reports, and other web sources to find great stocks to study, to find red flags in stocks you are studying and to improve your SSG projections.
3:00 PM EDT	Nick Stratigos	Score a Portfolio Touchdown – When to Play Defense/Offense – Advanced REGISTER	Portfolio Management Defense is about identifying the companies that are not performing up to expectations and replacing them. Defense usually is critical – to minimize damage and protect your portfolio. Action is required now and has nothing to do with price. Portfolio Management Offense is about improving your portfolio. It has everything to do with price. Portfolio Management Offense is not time critical. You will learn how to recognize when it is time to be defensive and offensive. The on-line tools will be used to demonstrate both actions