

# BetterInvesting Space/Gulf Coast Chapter Investor Education Day

Eckerd College, St Petersburg, FL  
2 March 2019 / 8:30 am - 4:30 pm

[Click here to Register](#)

**\$40.00 Registration Includes Lunch**

Investor Education day features the President of IClub Central and the Editor-in-Chief of the Investor Advisory Service and Small Cap Informer newsletters, Doug Gerlach. Doug will present four sessions about investing that should appeal to every level of investor from beginners to advanced.

There will be two morning sessions and two afternoon sessions, with a boxed lunch included with your registration. BetterInvesting Volunteers will be on hand for questions and stock education material.

## Douglas Gerlach

For 25 years, Doug Gerlach has taught investment clubs and individuals to make smarter decisions about investing in the stock market, through books, software tools, websites, and investment educational presentations across the U.S.



Gerlach is the President of ICLUBcentral Inc., a wholly-owned subsidiary of BetterInvesting and makers of software and websites for individual investors and investment clubs. He is the author of six financial books, including *The Investor's Web Guide*, *The Complete Idiot's Guide to Online Investing*, *The Armchair Millionaire*, *Investment Clubs for Dummies*, *BetterInvesting's Guide to Computerized Investing and the Internet*, and *The Pocket Idiot's Guide to Direct Stock Investing*. He has written articles for publications such as *Individual Investor*, *PC World*, and *Computer Life*, and was a Consulting Editor and columnist for *Time-Life's Mutual Funds Magazine*.

A familiar name to many BetterInvesting members, Doug has spoken at investor events from Honolulu to Berlin, for such organizations as the National Education Association, National Investor Relations Institute, the American Association of Individual Investors, and Charles Schwab, as well as at personal finance conferences organized by Money Show, CNBC, Boston Globe, Baltimore Sun, Fort Lauderdale Sun-Sentinel, Morningstar, BetterInvesting and Oregon Public Broadcasting. He has taught at investor events in more than 80 cities across the U.S., where his skill in explaining often-complex concepts with humor, energy, and clarity helps to turn investors into better investors. He is also Editor-in-Chief of ICLUBcentral's two investing newsletters: the long-term market-beating Investor Advisory Service and the SmallCap Informer. The Investor Advisory Service is one of the top-performing stock newsletters in the country and has been named to the Investment Newsletter Honor Roll by Mark Hulbert's Hulbert Ratings for nine consecutive years from 2010 through 2018, in recognition of its outstanding performance in both up and down markets over the past decade."

## Topics for your Education Day

### **The Two Things You Must Know to Successfully Pick Stocks**

While the mechanisms and machinations of the markets have changed mightily since Benjamin Graham first came up with a practical method for analyzing stocks, or even since Peter Lynch racked up big wins picking equities for Fidelity's Magellan Fund, at least this remains true: companies that deliver constant profits for shareholders will see their share prices increase. But what are the keys to successful fundamental stock selection? Doug Gerlach, president of ICLUBcentral Inc., and editor-in-chief of its Investor Advisory Service and SmallCap Informer will clew {☺} us in.

### **Sensible Strategies for Coping with Bear Markets and Recessions**

Nobody knows which way the winds will blow the markets or the economy in the near-term. But knowing how bear markets and recessions work and implementing a few simple strategies can help weather the storms when they do arrive. In this session, Doug will discuss tips on facing down and sideways markets, all from the perspective of long-term oriented stock investors. In addition, Doug will present several stock ideas and themes to explore in the current market environment. from making cogent resolutions when it comes to selling stocks.

### **Eliminate "Sell" from Your Vocabulary**

Knowing when to sell is one of the toughest decisions an investor can make. Psychological and behavioral roadblocks prevent individuals from making cogent resolutions when it comes to selling stocks. But Doug Gerlach has ideas on how to improve your personal or club portfolio without getting stuck on "knowing when to sell."

In this session, Doug will outline his strategy for continually optimizing and improving your stock portfolio, including how to identify candidates for replacement due to overvaluation, low potential return, or fundamental obstacles to future growth. You'll receive tangible steps for a rational approach to portfolio management that will help you upgrade your portfolio right away

### **The Small Cap Advantage: Generating Superior Returns from Small Company Stocks**

Is the growth in your personal or club portfolio stalled? A growth stock strategy depends on capital appreciation for the greatest share of returns over time, which in turn is generated by the growth of each company's sales and earnings. However, too many investors who ascribe to the growth stock approach overweight their portfolios with slow-growth businesses and thus fail to perform as they hope. Small and midsized companies provide top opportunities to boost potential returns but can add additional volatility. Learn how to find and analyze smaller stocks with high total return potential but are also suitable for a BetterInvesting-style long-term, growth-oriented stock portfolio.

## Agenda

<b>Time</b>	<b>Activity</b>
8:30	Setup/Registrations
9:00	Welcome and Introductions
9:15	Session 1 - <b>The Two Things You Must Know to Successfully Pick Stocks</b>
10:05	Break
10:10	Investing Tips, Tricks, & Techniques
10:30	Session 2 - <b>Sensible Strategies for Coping with Bear Markets and Recessions</b>
11:50	Lunch with Slideshow of BI Resources & Updates on Florida Chapter Events
1:10	Session 3 - <b>Eliminate "Sell" from Your Vocabulary</b>
2:00	Break
2:05	Session 4 - <b>The SmallCap Advantage: Generating Superior Returns from Small Company Stocks</b>
3:30	Closing Remarks: <ul style="list-style-type: none"><li>• Open Forum for Questions from Audience</li><li>• Model Club &amp; Tuesday Training Announcements</li><li>• Q&amp;A and live demonstrations as requested by the attendees</li></ul>
4:30	Have a safe trip home and we hope to see you at future BI events live & online

## Additional Information

Registration: <https://www.eventbrite.com/e/betterinvesting-spacegulf-coast-chapter-investor-education-day-tickets-53716772312>

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