

2018 PUGET SOUND INVESTORS EDUCATION CONFERENCE

Puget Sound Chapter - BETTERINVESTING

November 10, 2018

Mercer Island Community & Event Center
8236 SE 24th St., Mercer Island, WA 98040



High Quality, Great Price: Invest in Yourself

- 20 hours of quality classes; your favorite instructors
- 4-part beginners' SSG track
- Lots of stock ideas
- Easy access, free parking

Register online: 2018-psc-iec.eventbrite.com

Early-bird deadline is October 29: \$65 for BI members

(Mail-in registration form, with all pricing levels, is on the back page of this brochure)

Complete event information: betterinvesting.org/puget

Why should you attend? Here's what last year's attendees said:

- Got me keyed up to do more investing; Re-energized my commitment to our club
- Great information that's useful and helpful
- It's motivational to be around like-minded people
- Instructors are approachable and willing to give contact info
- Excellent value. I always learn a lot
- I learn something new and useful every year
- Good variety. Quality presentations. Organization great! Personable helpers, impressive
- To gain your financial freedom, join BetterInvesting!

CONFERENCE SCHEDULE

Morning Sessions

8:30

Check-In, Welcome & Opening Remarks

9:10

Portfolio Management 1
Mike Torbenson

Small-Cap Growth Stocks with Big Potential
Doug Gerlach

Bonds: The Other Part of Your Portfolio
Gary Ball

What's New in Online Tools / Suzi Artzberger

10:10

Portfolio Management 2 / Mike Torbenson

Cash-Covered Puts or How to Buy Stocks for
Fewer Dollars / Bruce Ellis

Maintaining an Investment Club / Linda Glein

*SSG 1: Historical Growth & Company
Management / Edwin Valbert

11:10

Investing for Busy People / Edwin Valbert

20-Point Stock Checklist / Doug Gerlach

Estimating Future P/E Ratios on the SSG
Gary Ball

*SSG 2: Forecasting Sales & Earnings
Suzi Artzberger

Noon-1:05: Lunch

Afternoon Sessions

1:15

Cloud Computing: What Is It and How Does
Business Benefit From It / Mike Torbenson

A Closer Look At Using Analysts' Estimates
Doug Gerlach

Starting an Investment Club / Linda Glein

*SSG 3: Evaluating Future Stock Price / Suzi
Artzberger

2:15

Online SSG Review: Conducting Your Monthly
Meeting / Mike Torbenson

The Investor Advisory Service: How the Pros
Buy and Sell the BI Way / Doug Gerlach

Investing Within a 401(k): For Busy and
Beginning Investors / Edwin Valbert

*SSG 4: Live Review & Discussion
Suzi Artzberger

3:15

Let's Talk Stocks
Gerlach, Glein, Torbenson, Valbert, Artzberger

4:05-4:15

Wrap-Up and Thank You

*Indicates Beginners' Track

**Schedule subject to change. Check
betterinvesting.org/puget for class descriptions and
instructor bios.**

Club Portfolio Contest

How Does Your Club Stack Up?

As in the past several years, the annual Club Portfolio Performance Contest this year will recognize up to three BI clubs based on their benchmark performance **over 1-, 3- and 5-year time periods**. A prize will be awarded for each of the time periods based on contest entry requirements.

All club contacts were sent an entry form and rules. **Entries must be received by October 20, 2018.** Please contact Diane Ellison at dial@quidnunc.net if your club did not receive an entry form.

Winners will be announced during the lunch session. The first-place winner will choose first from the available prizes, the second-place winner next, and the third-place winner last.

Each club with a performance better than the market (S&P 500 - VFINX) for the designated time frame, or greater than 15%, will be publicly recognized in the next Puget Sound Chapter newsletter and submitted to the BI magazine for publication.



Handouts

Registered attendees will receive an email prior to the event with instructions on printing the handouts. We suggest you print (or save to your laptop) the handouts for the classes you plan to attend, so you can take notes on them during the class.

A CD with all class materials will be available when you check in at the event.

Venue

Like last year, this year's IEC will be back at the Mercer Island Community and Event Center, 8236 SE 24th St., Mercer Island.

The center is conveniently located just off Interstate 90 and has plenty of free parking. And we're definitely correcting some of the complaints about last year's lunches (no more spicy ham!) The center is adjacent to the beautiful Luther Burbank Park on Lake Washington, perfect for a quick walk during the lunch break or when your legs need a stretch.

Driving Directions:

From I-5, take I-90 East to Mercer Island

Take the 77th Ave. SE exit (#7A) immediately after the 2nd tunnel, and turn left on 77th Ave. SE. Turn right at the stop sign onto N. Mercer Way, go through the light at 80th Ave. SE. Turn left onto 81st Ave. SE. Turn right on SE 24th St. The center is two blocks up on the left.

From I-405, take I-90 West to Mercer Island

Take the Island Crest Way exit (#7). At top of the ramp, turn right onto SE 26th St. At the stop sign turn left onto 84th Ave. SE, then left onto SE 24th St. The center is on the right.

By bus, King County METRO Transit provides bus service to the I-90 Park 'n Ride, about three blocks west of the center.

Hotel Arrangements

If you are coming from outside the immediate Puget Sound area, Days Inn Bellevue is offering a special rate for IEC attendees of \$76/night (plus tax). This includes free continental breakfast, wi-fi access and parking. Contact the hotel at 425-643-6644 and mention the Days Inn Bellevue and the Puget Sound Chapter BetterInvesting room agreement or Shaun Danielson. The rate applies for Nov 9 and 10.

This hotel is near the intersection of I-405 and I-90, and is just a few miles from the IEC venue at the Mercer Island Community and Event Center.

Register online: 2018-psc-iec.eventbrite.com

Complete information: betterinvesting.org/puget

Puget Sound Chapter - BetterInvesting™
38th ANNUAL INVESTORS EDUCATION CONFERENCE – November 10, 2018
Mercer Island Community & Event Center, 8236 SE 24th St. Mercer Island, WA 98040

PLEASE PRINT CLEARLY—YOUR NAME BADGE DEPENDS ON IT!

Online & credit card registration is available at: <https://2018-psc-iec.eventbrite.com>

Name: _____ BI Membership # : _____
 (if none, please enter none)

Club Name: _____ BetterInvesting Chapter: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: (_____) _____ Email: _____

Please print clearly - Email is for registration confirmation only

Registration	BI Member	Non-BI Member
EARLY BIRD Registration - MUST be postmarked by October 29 – Includes lunch	\$65 per person	\$125 per person
Standard Registration – MUST be received no later than November 9 – Includes lunch	\$85 per person	\$145 per person
On-Site Registration - On a space-available basis at the event – DO NOT MAIL! Advance registration is strongly recommended! Includes lunch	\$115 per person	\$175 per person
Student Registration - Name of School: _____ <i>K-12 only</i>	\$25 per person	\$25 per person
AMOUNT Enclosed:	_____	_____
Sandwich Selections – Please check the desired sandwich selection. All selections include a drink, fruit, cookies and chips		<ul style="list-style-type: none"> ◇ Ham ◇ Turkey ◇ Vegetarian ◇ Chicken on gluten-free bread

SPECIAL CLUB REGISTRATION - \$10 DISCOUNT*

When 3 or more members from the same club attend the IEC, receive a \$10 discount for each registration. Please complete registration forms for each attendee, take a \$10 discount for each registration and mail the registration forms and checks together to the address listed here.

MAKE CHECKS PAYABLE TO: PSC-NAIC

Mail your completed form(s) and check to:

Puget Sound Chapter - *BetterInvesting*
 c/o Betty Taylor
 31811 Pacific Hwy S - Ste B335
 Federal Way, WA 98003

<ul style="list-style-type: none"> • Advance registration is strongly recommended! • Reservations will be confirmed by email (if provided above). • Sorry, refund requests received after November 2 cannot be honored. 	<p style="text-align: center;">If you have any special needs, food or otherwise, please attach a page explaining your needs.</p> <p style="text-align: center;">♿</p> <p>For questions or further assistance with registration, 206-935-0861 or contact@puget.betterinvesting.net</p>
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