

**INVESTMENT FORUM AGENDA FOR WEDNESDAY, APRIL 8, 2015, 11:50AM,
Fellowship Hall, Lord of Life Lutheran Church**

Market Perspective. Markets were flat for the four-day week, with the DOW and S&P each up 0.3%, and the NASDAQ flat. Those numbers do not reflect the poor jobs numbers, which came out on Friday, when markets were closed. There is increasing concern that global economies are slowing. Will this news be negative or positive for markets? Economic weakness should be bad. But in this upside-down World, this weakness may be viewed as positive, if it delays the Fed's decision to increase interest rates.

Investment Forum Website demo. Paul Howard will walk us through the Forum website.

Panel on Investment Advisors. Investment Advisors (aka Financial Advisors, Money Managers) come in various shapes and sizes, and offer a variety of services and a range of costs. They include:

- “account executives” who are assigned to brokerage account relationships.
- Investment Advisors with or without discretionary trading authority.
- Investment Advisors for all or a portion of a portfolio.
- Low-cost, packaged services.

Frank Mertes and Maury Cralle will discuss their use of Investment Advisors, including why they use them, how they selected them, what kinds of services they use, and how they are performing. Tom Crooker and I will also comment. I can still add another panelist if you advise me before Wednesday.

Please bring your questions. I plan to have additional panels and discussions of Investment Advisors in the future, to address questions that you still have.

Buys and Sells (week of March 25)

Buys

First Trust NASDAQ Technology ETF (TDIV)

Aetna (AET)

Gilead (GILD)

Financial Sector SPDR ETF (XLF) - add to

Stratasys (SSYS) - 3D printing. MC: \$3B

Northrop Grummon (NOC)

Boeing (BA) - add to

Sells

Qorvo (QRVO) - mobile devices technology. MC: \$11B

Genetic Technologies (GENE)

Biomarine Technologies (BMRN) MC: \$19B

Thinking About . . .

World Wrestling Entertainment (WWE)

Under Armour (UA)

Forum Resources

Investment Forum Website. The Investment Forum has its own website, www.olligmu.org/~finforum. Or the OLLI website, www.olligmu.org, and from the Main Menu, click on “Clubs, Group Blogs, and Ongoing Activities,” and then “Investment Forum.” The current agenda and previous agendas are posted, as well as articles in the financial press that members recommend.

AAll (American Association of Individual Investors.) The DC Metro Chapter of AAll has monthly seminars on investment topics, given by recognized experts. AAll also publishes a magazine and resources for individual investors. The website for the DC Metro Chapter is aaiidcmetro.com. Seminars are held monthly on Saturday mornings at the Sheraton Pentagon City, and usually cost \$35. Sign-ups are online. The next event is April 18, “Guerrilla Approaches to Finding and Evaluating Stocks,” and the presenter is Marc Gerstein, Director of Research, Portfolio 123 and Editor of Forbes Low Priced Stock Reports.

Fairfax County Library Online Resources. If you have a library card, you can access the premium services of Morningstar, Standard & Poors, and Value Line.

- Go to the Fairfax County website fairfaxcounty.gov, and select “Library Services,” or go directly to the library website, fairfaxcounty.gov/library.
- From the Index, select “Online Resources.”
- Select “Business and Finance.”
- Select the service you want, which include Morningstar, S&P, and ValueLine. Click on “log in.”
- You will then be asked for your library card number. Enter it.

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