

## Stock to Study Presenter & Team's Guide and Checklist

### General tips:

- Avoid acronyms; define acronyms where used
- Never read Power Point slides
  - use the Notes Pages feature
  - printout a set of Notes Pages for use during your presentation
- When presenting from home:
  - Turnoff all possible distractions, e.g., cell phone, call waiting, email, instant messaging, anything that chimes, fans, relocate pets, wife/husband, and youngsters to another room
  - If monitoring a second computer, mute its sound
- Defer advanced or otherwise esoteric questions to be answered privately offline
- Be aware that lectures from your home without the feedback from a live audience are different.
  - Practice
  - Try to avoid a reading or monotone voice
  - Add humor if possible
  - Helpful, friendly, courteous, kind host, poll, and question handlers are a great help
- Avoid showing items that you are not familiar with, e.g., Select a Potential Low Stock Price > Other > ALT+R for Price Variance Quotient
- Timing:
  - Start on time
  - Stay on session timeline with help from host
  - Answer questions during polling as an aid to filling "dead air"

### Preparation:

- Background information:
  - Value Line report
  - S&P Report
    - Plot S&P Core Earnings vs. Company Reported Earnings
    - Peer list
  - ManifestInvesting for specific stock and its industry/peers
  - TakeStock
- Select data for Stock Selection Guide
  - Value Line
  - StockCentral's Hemscott America
  - BetterInvesting's S&P Stock Data Service
- Investor's Toolkit
  - Setup a unique library just for your presentation
  - Copy other companies that you might refer to or use in the Stock Comparison Guide into that folder
  - Consider locking the stocks in that library so that you will not be surprised by updates
- File preparation
  - Save your Power Point presentations with the PPS extension
  - Export your company under study as an ITK or SSG and use to open Investor's Toolkit

## Stock to Study: Presenter & Team's Guide and Checklist (Continued)

- Select backup crew:
  - Host
  - Polling
  - Questions
  - Guru, if needed

### Timeline:

- 12 weeks prior:
  - Select/choose candidate companies
  - Draft script outline
  - Attend any/all available online training for presenters
  - Peruse Lessons Learned from earlier presenters
- 6 weeks prior:
  - Select company for study
  - Write initial script
- 4 weeks prior:
  - Present script for review
  - Present biographical information and photo
- 3 weeks prior:
  - Review script
  - Incorporate worthy suggestions
  - Present poll questions
- 2 weeks prior
  - First rehearsal
  - Present files for uploading for attendees
- 1 week prior
  - Dress rehearsal
- P-Day (Presentation Day)
  - Team log in early (especially the presenter)
  - Relay
  - Trust your team
  - Present
  - Handle questions that you are sure of
  - Defer difficult questions for addressing later but definitely answer them
- 1 day post:
  - Log your lessons learned
- 1 week post
  - Provide answers to deferred questions
  - Present final files for publication online
  - Present your Lessons Learned documentation including changes to this document