



## *Financial Management Association*

General Meeting | **Classroom 2319**

1. Attendance –
  - Sign-in sheet (make sure your name and/or email are very legible)
  
2. Call to Order –
  - Highlights from our previous meeting
    - Evaluate Portfolio – Discussed ideas about selling off half our holdings in Sherwin Williams (SHW) & all our shares in Under Armour (UA). Concluded that we will need **new stock picks & information** ready to be presented to the advisors when we decide to unload from one of our current positions.
    - **Research Teams** – Divided into pairs to evaluate & accommodate new stock picks for the Portfolio. Each group will research & present their findings to the club over the next few meetings. Then we will vote on the best stock(s) to buy into. Under *Portfolio* section is the list of the groups. If you would like to be added or changed please contact an executive member.
  
3. Officer Reports – (executive members or member open up the discussions)
  - Chief Executive Officer – Greet new members
  - Chief Financial Officer – Presentation on Verizon (VZ)
  - Chief Technologies Officer – Updates & changes to the webpage
    - Click on the link to enter our webpage [clubs.umflint.edu/fma/](http://clubs.umflint.edu/fma/)
  - Member – Does anyone have any questions?

#### 4. New Business –

- Presentation(s)
  - Information & presentation on Verizon (VZ) – Adham
- Student Organization Funding Board (SOFB) – Bradley
  - Open to new ideas & hosting more events in the future
  - Discuss dates, times & costs for such events
- Investopedia Stock Simulator (Trading Game)
  - Check the rankings (resets daily). View player's portfolios & their trade history. Click the [Link](#) & login to Investopedia.

#### 5. Portfolio –

- View current holdings
- **Research Teams** – (list is not specifically ordered)
  - T-Mobile (TMUS) & Verizon (VZ) – Adham & Mark
  - Exxon Mobile (XON) & Ford (F) – Bradley & Joel
  - Shopify Inc (SHOP) & Square Inc (SQ) – Doug
  - Gilead Sciences (GILD) & Pfizer Inc (PFE) – Jennifer & Precious
  - Bank of America (BAC) – Ioana, Minyan, & Sisle
- Call for a vote

#### 6. Signature Events –

- Guest Speakers – Ideas on having future guest speaker come in

#### 7. Open Floor – Everyone is welcome to freely talk, don't have to wait until the end to ask a question. If you are confused, we will try to help clarify.

- Discussions – small talk about BIG stocks
- New topics or any final questions

#### 8. ***Bid Everyone Adieu***

- Next Meeting – Reminder emails