



## *Financial Management Association*

### Research Meeting | Finance Lab

1. Attendance –
  - Sign-in sheet (make sure your name and/or email are very legible)
2. Call to Order –
  - Highlights from our previous meeting
    - Planning to compete in two investment pitch competitions.
      1. Undergraduate Investment Conference in Ann Arbor on October 20<sup>th</sup>. Must have team of 5 members and US equity stock to pitch.
      2. CFA Research Challenge in Grand Rapids in February. We need a team of 5 members and also stock to pitch.
    - Talked about the members taking the Bloomberg Market Concepts training course. Like to get a team of members together to budget our conference trip to Chicago this winter semester 2018.
3. Officer Reports – (executive members or member open up the discussions)
  - Chief Executive Officer – Stock Game & info about the stock competitions
  - Chief Operations Officer – Bloomberg training
  - Chief Technologies Officer – Minor webpage updates & changes
    - Click [here](#) to view the FMA webpage
  - Chief Investment Officer – Info on our current portfolio stocks
  - Member(s) – Does anyone have any questions?
4. New Business –
  - Undergraduate Investment Conference (UIC) – Adham
    - Investopedia Stock Simulator (Trading Game). Click [here](#) to login and setup your account. The game will be starting soon!

- Student Organization Funding Board (SOFB) – Bradley
  - Adding 2<sup>nd</sup> meeting time? *Wednesday 4-5 pm*. Discussion & vote
  - BMC Training Guide PowerPoint

5. Portfolio –

- View current holdings
  - News & Related Information (pertaining to our holdings) – Collins
  - Stock Picks & Information – Open floor discussion
- Call for a vote

6. Signature Events –

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

7. Open Floor – May talk freely, 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. ***Au Revoir Everyone***

- Next Meeting – Reminder emails