Financial Management Association
Research Meeting | <mark>Finance Lab</mark>

1. <u>Attendance</u> –
   - Sign-in sheet (make sure your name and/or email are very legible)

2. <u>Call to Order</u> –
   - Highlights from our previous meeting
     - Planning to compete in two investment pitch competitions.
       1. Undergraduate Investment Conference in Ann Arbor on October 20th. 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. <u>Officer Reports</u> – (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 our webpage
   - Chief Investment Officer – Info on our current portfolio stocks
   - Member(s) – Does anyone have any questions?

4. <u>New Business</u> –
   - 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
  - o Adding 2nd meeting time? *Wednesday 4-5 pm.* Discussion & vote
  - o BMC Training Guide PowerPoint

5. <u>Portfolio</u> –
   - ➢ View current holdings
     - o News & Related Information (pertaining to our holdings) – Collins
     - o Stock Picks & Information – Open floor discussion
   - ➢ Call for a vote

6. <u>Signature Events</u> –
   - ➢ Guest Speakers – Ideas on having future guest speaker come in

7. <u>Open Floor</u> – 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