

## **INVESTMENT FORUM AGENDA FOR WEDNESDAY, May 14, 2014, 11:50AM, TA-1**

The Forum will meet at **10:30AM** starting May 21, to June 11. We will begin meeting again at 11:50AM on June 18 for the Summer session.

**Market Perspective.** Not much happened last week in the markets. You could say the same Year-To-Date. The DOW was up 0.43%; The S&P down 0.14%; and the NASDAQ down 1.26%. The three are up 0.04%; 1.63%; and down 2.51% YTD. Interest rates moved little last week and YTD. Many things to worry about (Ukraine, Fed tapering, labor force exits,) but those worries do not seem to be causing investors to sell.

**Investing with Grandchildren.** Burgess Levin and I will discuss investing with grandchildren. How to make the process fun. How much money is needed to make the process meaningful. How to involve the parents. How to do it with grandchildren who live outside the area. And finally, how to embed the interest in investing and turn grandchildren into investors for life.

If you invest with your grandchildren (or, for that matter, you children) please share your experiences.

**Energy.** Continuing our discussion on energy, Tom Crooker will discuss energy topics and energy investments he favors.

### **Future Forum Topics**

**Investing in Residential Real Estate.** On June 11, Linda de Marlor, a real estate and tax advisor, will discuss residential real estate as an investment. Buying houses as investments, renting them out, and eventually selling them. We will track the process, numbers, benefits, risks and rewards.

If you own residential properties that you purchased as an investment, please share your experiences.

### ***Buys and Sells***

We did not collect the Buys and Sells last week. This week, please list your Buys and Sells for two weeks.

Al Smuzynski  
Investment Forum Moderator  
asmuzynski@verizon.net

