



Michael Osteen
Chief Investment Officer
of Research, Port Wren
Capital LLC

JOIN US AND LEARN

- The most critical component to long-term capital appreciation
- How to look at stocks as a total business and not as a share price

THE KEY TO BETTER INVESTMENTS

FIRST-TIME ATTENDEES GET IN FREE! See Inside for Details



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CHARLOTTE
MEETING

Saturday
February 13, 2016

Chapter Information

RESOURCES

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Special Notes

I apologize for the late notice. While we search for topics and speakers for those topics we would like your comments on possible speakers. The group has been growing and I would like to keep the meetings informative for each aspect of investing.

—Scott Kummer, Chapter President

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Meeting Details

Saturday, February 13, 2016

MYERS PARK UNITED METHODIST CHURCH

1501 Queens Road
Charlotte, NC 28207
704/376-8584

SCHEDULE

Roundtable 8:00-9:30 a.m.

Registration/Social/Refreshments

9:30 a.m.

Program 10:00 a.m.

Q&A 11:30 a.m.

FEES

At the Door

AAll Member & Spouse, **\$5**/person;

Nonmembers, **\$10**/person

First-Time Visitors, **Free**

REFUND POLICY

No refunds.

More Information

Roundtable Discussion

An informal sharing of information between members (roundtable) begins at 8:00 AM before each meeting. With nearly 30 attendees it is nearly as popular as the presentations.

Driving Directions

Myers Park United Methodist Church is located just minutes from Uptown at the corner of Oxford Place and Providence Road (near the intersection of Providence Road and Queens Road). Park directly behind church off of Queens Road. Meeting room is adjacent to the parking area.

The Charlotte Chapter Presents...

Saturday, February 13, 2016

THE KEY TO BETTER INVESTMENTS

Michael Osteen

Chief Investment Officer of Research, Port Wren Capital LLC

YOU WILL LEARN

- The most critical component to long-term capital appreciation
- How to look at stocks as a total business and not as a share price
- The necessity of knowing and understanding the “story” behind the company and the potential catalysts

Numerous value investing portfolios have demonstrated above-average returns on stocks going back to 1928. Value investing is one of the best known stock-picking strategies since its introduction by Benjamin Graham and David Dodd and made more popular by one of Graham’s students, Warren Buffett. The concept is simple, but there are various ways to implement it. Michael Osteen will speak about the key behind successful investing and his distinct contrarian strategies. As Warren Buffet says, “Price is what you pay. Value is what you get.”



Michael Osteen is an accomplished value investor, author and financial contributor. As a successful serial entrepreneur he brings a very unique prospective to value investing; he obtained an average realized gain of 83% in 60 months.

Osteen holds an MBA from Rivier University in New Hampshire as well as a B.S. with honors from Clemson University in South Carolina. He completed two years of accounting with a 3.75 GPR at the undergraduate level.

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