

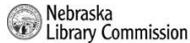


Smart Investing@your library® Builds Nebraska Communities

Check-in #2 Webinar

Smart Investing: Reference Strategies & Resources

May 29, 2014



Smart Investing@your library® Builds Nebraska Communities

This program is made possible by a grant from the FINRA Investor Education Foundation through Smart investing@your library®, a partnership with the American Library Association. This program is sponsored by the Nebraska Library Commission and Northeast Library System.

Smart investing@your library®



Staff
Development
for Effective
Program
Delivery



What's New?

- Resource Books/DVD's being distributed to 22 libraries (May 21 – June 30)
- Individual & Bulk Inter-Library Loan available shortly
- Pinterest Board for displays related to finance and money

www.pinterest.com/repvalley/displays-about-finance

Agenda Item #1

Discussion of questions submitted

CD Question

Others?

Feel free to submit any now

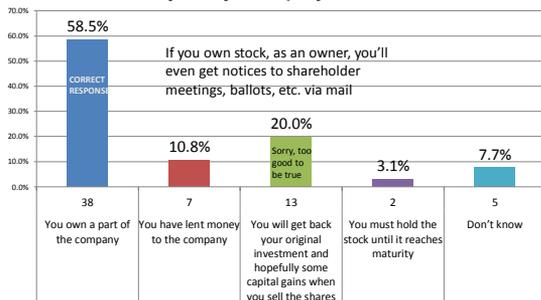
Poll Question 1

If you buy a company's stock...

- You own a part of the company
- You have lent money to the company
- You will get back your original investment and hopefully some capital gains when you sell the shares
- You must hold the stock until it reaches maturity
- Don't know

Results from Pre-Evaluation

If you buy a company's stock...



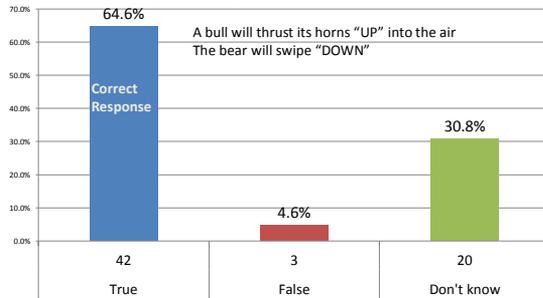
Poll Question 2

A Bull Market is one where prices of securities such as those traded in the stock market, are rising or are expected to rise.

- True
- False
- Don't know

Results from Pre-Evaluation

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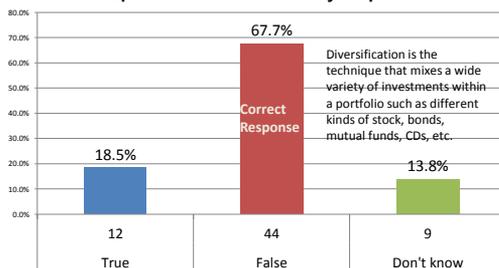
Poll Question 3

Spreading your investment dollars over 10 different technology companies would be a good example of "diversification" in your portfolio.

- True
- False
- Don't know.

Results from Pre-Evaluation

Spreading your investment dollars over 10 different technology companies would be a good example of "diversification" in your portfolio.



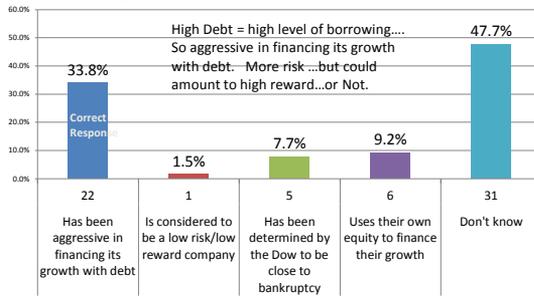
Poll Question 4

A company with a high debt-to-equity ratio generally means that the company:

- Has been aggressive in financing its growth with debt
- Is considered to be a low risk/low reward company
- Has been determined by the Dow to be close to bankruptcy
- Uses their own equity to finance their growth
- Don't know

Results from Pre-Evaluation

A company with a high debt-to-equity ratio generally means that the company:



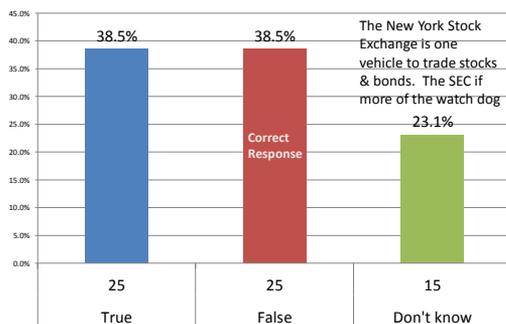
Poll Question 5

The Securities and Exchange Commission is the vehicle in which stocks and bonds are traded.

- True
- False
- Don't know

Results from Pre-Evaluation

The Securities and Exchange Commission is the vehicle in which stocks and bonds are traded.



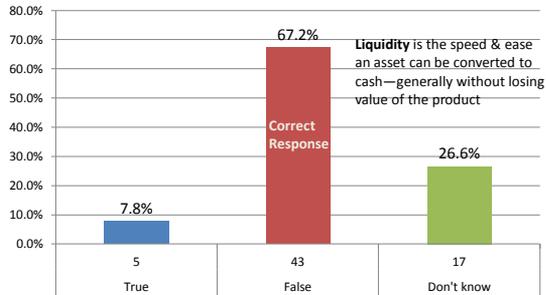
Poll Question #6

Liquidity refers to investments that increase or decrease rapidly when there are changes in the economy.

- True
- False
- Don't Know

Results from Pre-Evaluation

Liquidity refers to investments that increase or decrease rapidly when there are changes in the economy.



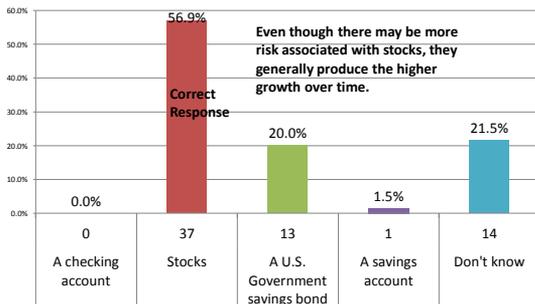
Poll Question #7

Which of the following tends to have the highest growth over periods as long as 18 years?

- A checking account
- Stocks
- A U.S. Government Savings Bond
- A savings account
- Don't know

Results from Pre-Evaluation

Which of the following tends to have the highest growth over periods of time as long as 18 years?



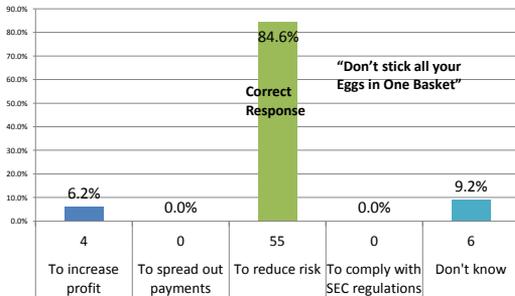
Poll Question #8

The primary reason for diversifying your portfolio is:

- To increase profit
- To spread out payments
- To reduce risk
- To comply with SEC regulations
- Don't know

Results from Pre-Evaluation

The primary reason for diversifying your portfolio is:



- Participants share questions and cool sites—useful features and target audience(s)

Cool Tools found...

- FINRA Investor Education Module—Safeguarding your Investment; tells you how to file complaints
- Best of the Best Business Websites (administered by the Reference & User Services Assoc.— Division of ALA). It includes portals to many sites recommended by Santa Clara plus others. It would be a good “starting” site to recommend to customers because of who maintains it.

Presentation by Partner:

Kathy Prochaska-Cue, UNL Student Money Management Center/UNL Extension, retired

Evaluation Considerations

- Collect Baseline Information
- Kathryn will send email with details, including:
 - Website
 - Financial Education Materials Circulation
 - Financial Education Reference Questions
 - Etc.



http://ifpmedia.org/onlinelearning/scclld_smart_investing/index.html

Online Staff Training
Using Curriculum developed for the
Santa Clara County (CA) Library District
through a FINRA Grant
***Designed to promote confidence and competence in
responding to library customer questions on
personal finance and investments***



Remember to keep looking  at Nebraska's
Value Added Documents
on our project web page at
<http://nlc.nebraska.gov/grants/finra/index.aspx>



Today's Webinar will be followed by 2 more units of
Readings each followed by a Check-in Webinar
For each of the 4 Units

- * Accomplish Unit Readings,
- * Review hot-linked web resources making note of how those might be useful to your customers,
- * Become familiar with this week's definitions, and
- * Email JoAnn any questions/concepts that you would like covered at the next check-in webinar.



Each of Check-in Webinars

Hosted by NLC and Kathy Prochaska-Cue & will include:

- 1) Each participant shares a “cool” web feature found on a hot-linked web site of value to library customers,
- 2) Discussion of the questions/concepts submitted by librarians  prior to next Check-in Webinar,
- 3) A 20-minute presentation by our partner resource person on a topic related to the latest reading assignment
- 4) Discussion of favorite questions from the pre-evaluation?



Schedule:

- √ April 30 – May 15 Accomplish Week 1 Readings
 - √ Check-in #1 Webinar – Thurs, May 15 2:00 pm CDT
 - May 15 – May 29 Accomplish Week 2 Readings
 - √ Check-in #2 Webinar – Thurs, May 29 2:00 pm CDT
 - May 29 – June 12 Accomplish Week 3 Readings
 - Check-in #3 Webinar – Thurs, June 12 2:00 pm CDT
 - June 12 – June 26 Accomplish Week 4 Readings
 - Check-in #4 Webinar – Thurs, June 26 2:00 pm CDT
- (Followed by Post Evaluation through SurveyMonkey)*

What topics would you like to have addressed in the Check-in Webinars?

Hot Topics for Week 3 Check-in?

Which of the following topic would you like to see addressed in the third Check-in webinar on June 12?

- Bonds and Ratings
- Mutual Funds
- Money Markets
- Rate of Return
- Financial Planning

Next Steps—Step #2

- Sign up for Check-In Webinar #3
Scheduled for Thursday, June 12 at 2:00 p.m. (CDT)

Click on “Calendar” at
Nebraska Library Commission’s Site --
www.nlc.nebraska.gov

If you have not....Step #3

- Bookmark the “Smart Investing” Project Page on the Nebraska Library Commission’s web site so you can find and use IMPORTANT Course Documents
 - Glossary (Alphabetical Order & Order of Appearance)
 - Nebraska’s Guide -- Course Outline with Nebraska Links
 - Webinar Recordings & Power Points
 - Librarian Training Calendar—Check-In Webinar Dates
- Click on “Grants – then Smart Investing@your Library OR type in *Smart Investing* in the *Search Box* on the Nebraska Library Commission’s home page --
www.nlc.nebraska.gov
- <http://nlc.nebraska.gov/grants/finra/index.aspx>

Next Steps—Step #4

- Work on Week Three Readings & Review Hot-linked Web Sites & Documents accessed from the Santa Clara County Library System’s web site at:
http://ifpmedia.org/onlinelearning/scclد_smart_investing/index.html



Questions



Thanks for Participating
& Thanks to

