

Qualified Opinion

Volume LVII

April, 2008

Number 11

At a Glance:

Next Meeting:

April 17, 2008

Carlyle's Grill

3660 Jackson Rd

Ann Arbor, MI

(West of Wagner Rd, at Quality
Cinemas)

Pre-Dinner Meeting: 5:45pm, \$12

Speaker: David Palmer

Topic: *Investor Peace of Mind*

After-Dinner Meeting: 7pm, \$25

(includes both meetings and Dinner)

Speaker: David Palmer

Topic: *Questions for Investing*

Carlyle's Menu

Steak Salad served with soup

Ahi Tuna Salad served with Soup

Rotisserie Herb Chicken & Carlyle salad

Wild Mushroom Ravioli & Carlyle salad

½ Rack of Ribs & Carlyle Salad

Jumbo Lump Crab Cakes & Carlyle Salad

Whitefish & Carlyle Salad

Steak Wrap served with Soup

Steak Pizza with a Carlyle Salad

****Dessert may be substituted for soup or salad**

RSVP TODAY! Make your reservation today
with Mary Cortese at mfcgram@yahoo.com or
call her at (734)-434-6218

RSVP now for April 17th!

You cannot miss this event! We are having a world-class investment advisor at our April meeting for both pre- and post-dinner sessions. You will leave brimming with enthusiasm, and excited about your newly gained knowledge about investing!

David T. Palmer, MBA, RFC is the President of Wealth Management Partners of Michigan, LLC. Dave began his career in the financial services industry in 1983. Prior to starting his own registered investment advisory firm in 1999, Dave held senior-level positions with The Milwaukee Company, Spear Securities, Jefferson Pilot Securities, NBD Bank, First-Chicago NBD Bank, and Bank One.

In his book entitled "101 Truths about Money and Investing," Dave shares an insider's look at how the profits of the financial services industry are an investor's biggest problem. A natural speaker, teacher and coach, Dave uses his extensive background in teaching to coach individuals toward a lifetime of peace-of-mind investing.

Dave holds a B.A. in Finance from Central Michigan University, and an M.B.A. in Business Administration from California State University, Los Angeles. He is a Registered Financial Consultant (RFC), and Guest Lecturer at Wayne State University, Detroit, MI and Eastern Michigan University, Ypsilanti, MI.

2008 Student Scholarships for \$500 and IMA Memberships were awarded at the March Chapter meeting to Meiqin Lu and Yana Parfenyuk. Honorable Mention awards of IMA Memberships and \$100 were awarded to JingJing Zhou and Stephanie Moore. Congratulations!

April Meeting's Speaker

Meet the Coach

Are you serious about your investments?

...

Serious about maintaining peak returns?

...

Serious about winning the investment game?

...

Serious about life-long investor peace-of-mind?



Then you need investment coach **David Palmer!**

When investors big or small positively, absolutely need to succeed at investing, they call David Palmer. He has a long and proven track record of coaching individuals and small businesses toward a life time of successful investing.

INTRODUCING DAVID PALMER, MBA, RFC

Described as “entertaining” and “passionate,” David Palmer is a powerful speaker committed to helping individuals prosper from their life savings. A natural speaker, teacher and coach, his speaking style inspires and captivates people on all different levels. Dave the speaker, coach and college instructor combine to draw on a lifetime of personal and professional experiences.

Investment Coach

Passionate about delivering his message, Dave shines in the wealth management seminars and investor coaching sessions he leads for individual investors and groups. Using his innate ability to simplify complex investment subject matter, Dave utilizes unique training concepts to impact his audience through his one-of-a-kind investor curriculum entitled; “*The Seven Deadly Investor Traps That Destroy Your Wealth and the Three Power Strategies to Fix Your Portfolio Fast*” and “*The Dirty Filthy Lies My Broker Taught Me and 101 Truths About Money and Investing.*”

In the role of investment coach, Dave offers support, guidance, experience and encouragement to investors seeking peace-of-mind about their investments. Dave defines peace-of-mind as the integration of emotions with intelligence in order to survive and thrive during unpredictable financial times without panic, delusion or remorse. Throughout Dave’s 1:1 coaching sessions and group attended investor briefings, coaches and attendees alike identify behaviors and actions that negatively impact their financial prosperity and personal happiness.

An Engaging Educator, Lecturer and Speaker

As college professor, lecturer and speaker, Dave has shared his powerful beliefs on wealth building with thousands through classroom lectures, public seminars and private investor briefings. Through thought-provoking questioning and discovery, Dave explains Nobel-prize winning investment theories in ways that investors can meaningfully understand and apply. His curriculum entitled; “*Separating the Myths and Truths about Investing,*” provides clients with the financial “blue print” they need to enjoy a lifetime of peace-of-mind investing.

“I attend many conferences throughout the year for business. As is often the case, I hear things said over and over that are either factually wrong or misleading. The message that David Palmer shares with his audience is straight and to the point and desperately needed to be heard. Dave is the only investment coach I know that is willing to tell it like it really is. His style is refreshing, direct and logical.” Edward Heil, Investor

Excel Tip

Generate GetPivotData

In Excel 2002, and later versions, when you type an equal sign, then click on a cell in a pivot table, you may see a GETPIVOTDATA formula, instead of a cell reference.

If you prefer to use a cell reference, you can:

- type the reference, e.g. `=B$5`

or

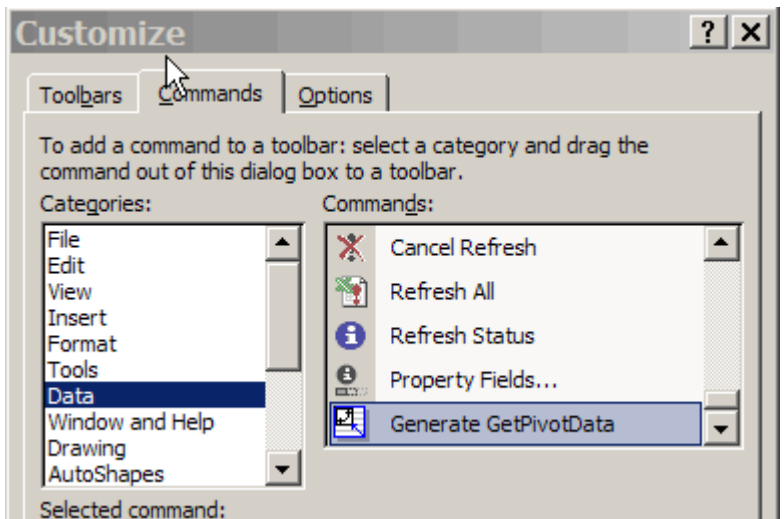
- add the Generate GetPivotData button to a toolbar, to turn this feature off.▲

To add a Generate GetPivotData button:

- Choose Tools>Customize
- Select the Data category on the Commands tab
- Near the end of the commands list, select Generate GetPivotData
- Drag the command to one of your toolbars
- Click Close ▲

Click the **Generate GetPivotData** button to toggle this feature on and off. ▲

	A	B	C	D
1	Region	Ontario		
2				
3	Sum of Unit			
4	Rep	Total		
5	Andrews	70		
6	Jardine	769		
7	Kivell	85		
8	Morgan	80		
9	Smith	12		
10	(blank)	672		
11	Grand Total	1688		
12				
13				
14	<code>=GETPIVOTDATA("Units", \$A\$3, "Rep", "Andrews")</code>			
15				



For more information and examples, see:

<http://www.contextures.com/xlPivot06.html>





2008 Scholarship Presentation

From L-R:

Chapter Scholarship
Director, Hyun Jin
Choi,
JingJing Zhou,
Yana Parfenyuk,
Dr. Bob Okopny,
Meiqin Lu,
Stephanie Moore,
Chapter President,
Bill Ebright

FIRST CLASS
DATED EDUCATIONAL MATERIAL



Change of Address Instructions

Please update your address, phone, and email at the IMA national web site www.imanet.org
If you have questions, call our local chapter board member Mary Cortese at 734-434-6218