

LESSONS FROM THE TRENCHES:
VALUE INVESTING,
ENTREPRENEURSHIP & LIFE

AGENDA

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AGENDA

Tuesday, February 6

1. Overview and introductions
2. Investing lessons from our story of success, then failure
3. Effective portfolio management
4. Five-company exercise
5. How to achieve superior performance
6. Case study: Valeant
7. Guest speaker: Christine Richard
8. Lessons from 15 years of short selling

AGENDA

Wednesday, February 7

1. Case study: Lumber Liquidators
2. Business/entrepreneurship lessons from our rise and fall
3. Case study: McDonald's
4. 10-company exercise
5. How to be a successful salesperson
6. Case study: Netflix
7. Guest speaker: Sahm Adrangi

AGENDA

Thursday, February 8

1. Case study: Weight Watchers
2. Avoiding value traps
3. Behavioral finance exercise
4. Behavioral finance presentation
5. The five calamities that can destroy your life – and how to avoid them
6. 10 strategies for winning the class participation & business meeting game
7. How to create a great slide presentation and make a killer stock pitch
8. How to make a great impression
9. How to deal with mistakes and apologize
10. How to cultivate mentors, make friends & develop deep relationships

HOW TO LAUNCH AND BUILD AND INVESTMENT FUND

Friday, February 9

1. Overview, introductions and agenda
2. Is now the right time to launch a fund?
3. How to choose and negotiate with a prime broker
4. Guest speaker: Don Reed
5. Key logistical questions (hedge fund vs. separately managed accounts, fees, redemption terms, when and who to hire, whether to have a partner or seed investor, etc.)
6. How I made a name for myself and built my business
7. Guest speaker: Enrique Abeyta
8. How to raise \$1 billion (or not)
9. How to create a great slide presentation & make a killer stock pitch
10. Examples of great (and not so great) investor letters
11. How to survive periods of poor performance
12. Examples of great investor pitch decks