



# How to Give an Advisory Board Meeting

9 August 2016

[www.mmspiretrading.com](http://www.mmspiretrading.com)

Rights of ownership remain with Professor Leslie K. McNew

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The Advisory Board Meeting is an opportunity for interns to showcase all that they have done throughout the time period of the fund.

This meeting is also the perfect chance for individuals who were a part of the team to leave a lasting impression on the board members by networking after the presentation has concluded.

This procedure shows all the “components” that are needed to make sure that the Advisory Board Meeting goes smoothly.



The most important part of the Advisory Board Presentation is the PowerPoint that the team makes to illustrate what they have accomplished throughout their time together.

Depending on what the team did throughout the summer or semester, the content within the PowerPoint will differ, but some things that must be included are:

- Company overview
- Meet our team
- Internship overview
- Trading returns
- Trader P/L
- Team P/L
- Compliance
- Advisory Board Members

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Above is an example of a table of contents from a previous years presentation.

Each member of the team must have their assigned slides memorized, but should have note cards prepared in case they forget their lines.

When presenting to the advisory board each team member should follow presentation etiquettes such as:

- Dress for the occasion
- Arrive early
- Eye contact
- Good posture
- Proper flow
- Enunciate
- Appropriate body language
- If a mistake is made, continue on.  
No one will know about the mistake except for you.

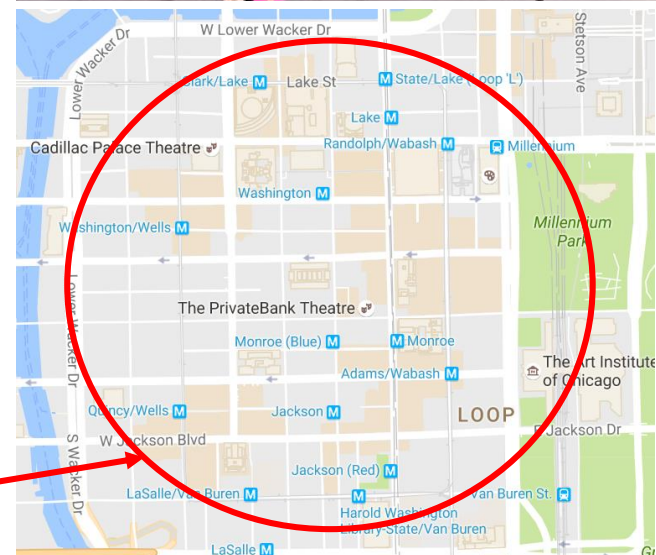


The presentation location should always be confirmed **at least a month in advance**. A time and place must be confirmed.

Contact Mr. Peter O'Neill through Professor McNew in order to schedule the use of a Uniper Global Commodities conference room at 181 West Madison Street Chicago, IL 60602.

This will be the default location, because it is convenient for the local Chicago Advisory Board members, and there are plenty of locations nearby for networking after the presentation.

Note: If in the future, the Uniper Conference room is unavailable, find a new location with Professor McNew's help that accommodates 20-25 guests and ample room to present. Preferably it should be within the heart of the Chicago Loop.



When giving advance email notice of the Advisory Board Presentation, create an invitation using an artistic stationary.

The invitation should include:

- Date and time of the event.
- Address of the presentation.
- Time and address of the networking event after the presentation.
- Any fees or costs.

Additionally the list of all Advisory Board members who are expected to attend the event should be on the email.

The invitation email should be sent to all Advisory Board members.



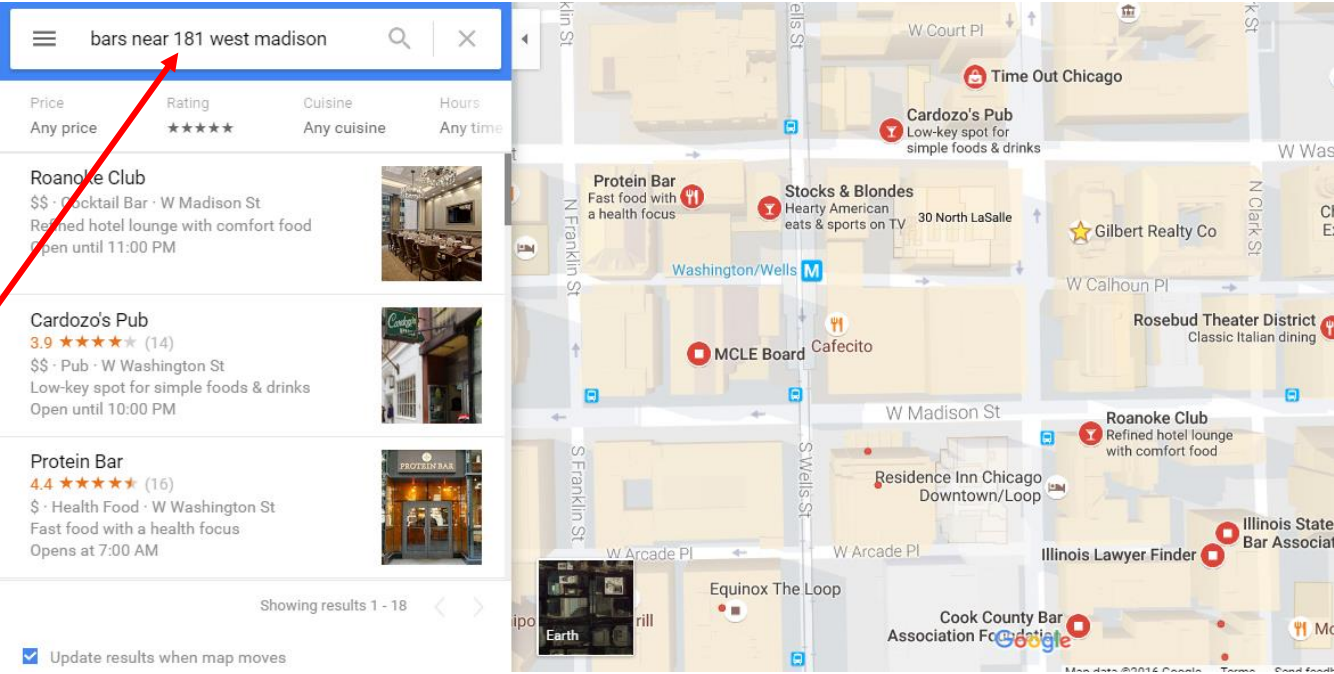
**MMSPIRE SUMMER INTERNSHIP ADVISORY BOARD MEETING**  
**11 AUGUST 2016**  
**THURSDAY**  
**5:15 PM MEETING LOBBY**  
**(NO LATE ARRIVALS)**  
**UNIPER GLOBAL COMMODITIES NORTH AMERICA**  
**181 WEST MADISON, SUITE 3450**  
**CHICAGO, ILLINOIS**

**6 PM**  
**312 CHICAGO**  
**136 N LA SALLE STREET**  
**LIBATIONS AND DISCUSSION**  
**(SOKOL BLOSSER ROSE, MARCHESI DI BAROLO MARAIA BARBERA**  
**DEL MONFERRATO, REGULAR BEER ONLY)**

**EVERY PERSON TO CONTRIBUTE \$20 TOWARD RECEPTION COST**

There is very specific criteria for selecting a location for networking after an advisory board presentation.

The first criteria is location. Use Google Maps or another app to search for restaurants and bars near the address of the Advisory Board Presentation. The location should be no further than a 10 minute walk away from the Advisory Board Presentation.

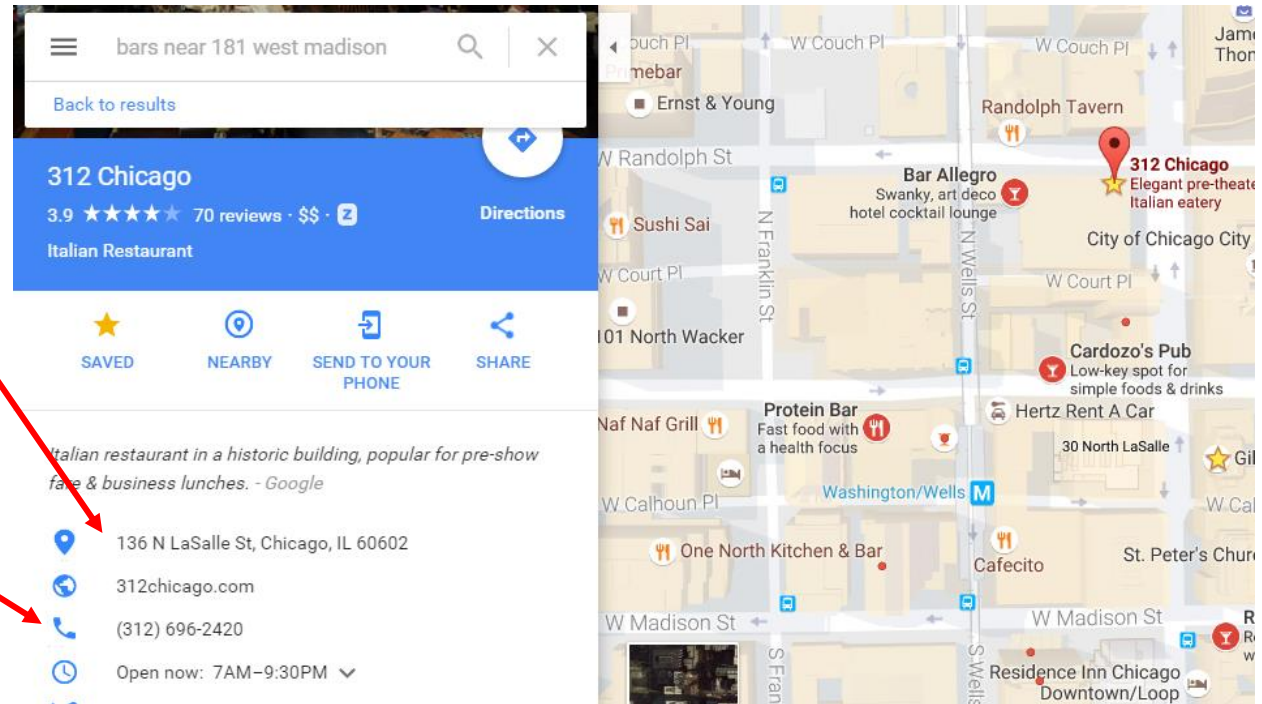




Start researching each venue within the 10 minute walk radius by seeing if they have a website.

Look for locations that have a private room. Call the different locations to compare pricing.

If possible, go to the various locations in person; it is easier to discuss the desired space, pricing, and drink menu in person.



Once a location has been chosen, try to establish a connection with the restaurant or bar you have selected for the event. It will be much easier setting up events at that location in the future.

A copy of the PowerPoint presentation must be completed and sent to all advisory board members at least 48 hours before the presentation is to be given.

Each member of the advisory board that is in attendance must have a physical copy, and those that are not in attendance should be provided with a digital copy of the most updated version of the presentation.


**Leslie Mcnew** @ 5:42 AM (4 hours ago) ☆
 

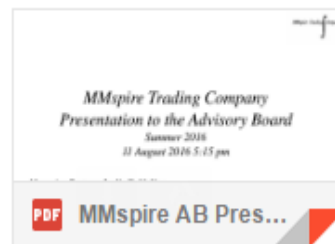
  
 to Brian, Jim, Daniel, Sean, Jam, Mary, Peter, Harry, Abe, Greg, Marianne, Alejandro, Michael, Thomas, Kevin.Beasley ▾

Dear MMspire Advisory Board and Guests,  
Please find attached the presentation that will be given Thursday, 11 August 2016 at 5:15 pm at Uniper.

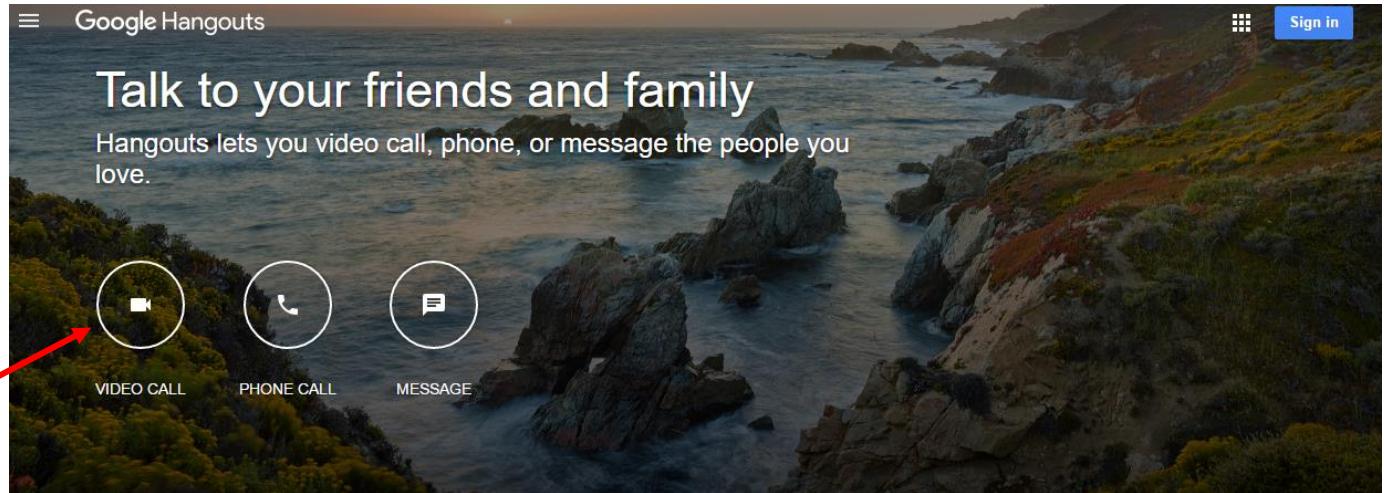
We have made arrangements to use Good Hangouts (YouTube) to allow access for non Chicago participants to log in and see and hear the presentation as it is being given. We will also be video taping the presentation and putting this video and the PDF of our presentation on our website next week.

I will be sending the security list to Mr. Peter O'Neill at Uniper at 11 am, so if you still want to attend this presentation and the reception afterwards, please respond to this email. Please arrival at Uniper on or before 5:15 pm as promptly at 5:15 pm will be going from the lobby to the board room and cannot handle late arrivals. Please remember to bring \$20 as your contribution to the reception (advisory board members, intern participants and guests).

Thank you very much for your time and interest in our interns. See you Thursday, Les McNew

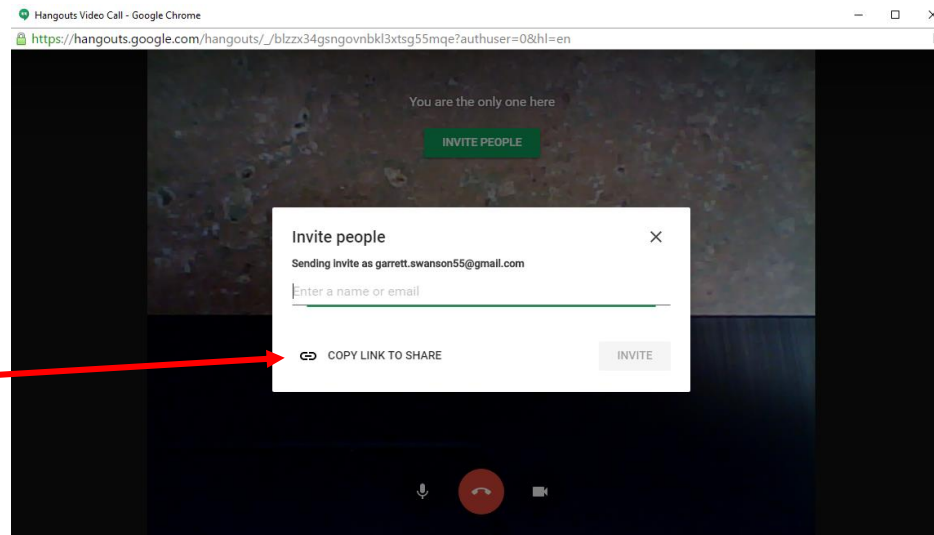


The team should ensure that all advisory board members have access to the presentation, and can participate in the Q&A session afterwards.



In order to make this happen, set up a Google Hangout video call.

Click on “Copy Link To Share.”



Paste the link in an email to the board members. This link will take them to the video call and allow them to join it.

Instead of using the internal computer microphone, buy an external microphone and place it near the presentation speakers. This will allow the listeners to hear the presentation more clearly.

Blue Microphones - Snowball USB Microphone - Aluminum

Model: 1936 SKU: 4464100 ★★★★★ 4.6 (80)



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Be sure that the presentation is recorded, but that the members of the audience or are attending via the internet are not recorded.

This will allow the advisory board members more freedom when speaking and asking questions.

The recorded presentation will be used to help future students prepare for their Advisory Board Presentations. Both examples of excellence and futility will be recorded for posterity.

