

**Latin American Burkenroad (BRLA)
Faculty Seminar
September 1 – 5, 2003**

Monday, September 1:

Time	Topic	
9:00 – 9:15	Introduction and goals for the week	John Trapani
9:15 - 9:45	Promotional materials: video, websites and brochure	Pamela Shaw
9:45 – 10:30	Historical background of U.S. and Latin American programs	

10.30 - 10:45 Break

10:45 – 12:30	Sections included in the Burkenroad public and private equity reports Using JOVUS equity research analyst software to control report preparation and review	Pamela Shaw
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12.30 Lunch

1:45 – 3:15	Information-gathering questionnaire and questions for management Equity research report examples	Pamela Shaw
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3:15 Break

3:30 - 5:00	Working Session: Creating an information-gathering questionnaire and questions for management <ul style="list-style-type: none"> • Historical financials and ratio analysis • Information-gathering questionnaire and questions for management • Operating, investing and financing sections of the financials 	Pamela Shaw Maria Lorena Gutierrez Daniel Moska Henrique Gherzi
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Tuesday, September 2

Time	Topic	
9:00 – 10:30	Case: Forecasting the operating sections of the financials using Excel & Crystal Ball	Pamela Shaw

10.30 - 10:45 Break

10:45 – 12:30	Case: Forecasting the investing and financing sections of the financials using Excel & Crystal Ball	Pamela Shaw
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12.30 Lunch

1:45 – 3:15	Case: Forecasting the operating sections of the financials using Eval	Pamela Shaw
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Burkenroad Reports of Latin America: Seminar Agenda

3:30 Break

3:30 - 5:00	Forecasting the investing and financing sections of the financials using Eval Discussion	Pamela Shaw Maria Lorena Gutierrez Daniel Moska Henrique Ghersi
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Wednesday, September 3:

Investment Research Conference

Thursday, September 4

Time	Topic	
9:00 – 10:30	Introduction to valuation and managing for value creation	Paul Spindt

10.30 - 10:45 Break

10:45 – 12:30	Working session: valuation techniques	Paul Spindt
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12.30 Lunch

1:45 – 3:15	Working session 2: valuation techniques	Paul Spindt
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3:30 Break

3:30 - 5:00	Introduction to valuation in private equity settings	Paul Spindt
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Friday, September 5

Time	Topic	
9:00 – 10:30	Working session: venture capital valuation	Paul Spindt

10.30 - 10:45 Break

10:45 – 12:30	The role of valuation in private and public equity markets	Paul Spindt
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12.30 Lunch

1:45 – 3:15	Discussion Period Implementation issues and conclusions	Pamela Shaw Paul Spindt Maria Lorena Gutierrez Daniel Moska Henrique Ghersi
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