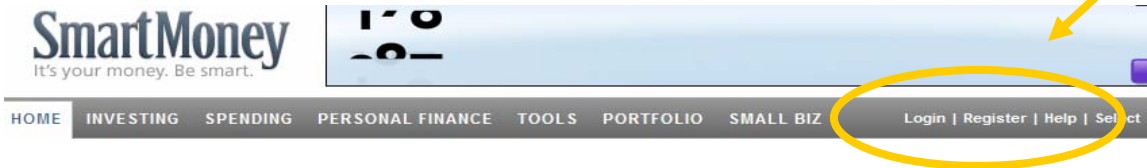


# SMARTMONEY INSTRUCTIONS

(1) [www.smartmoney.com](http://www.smartmoney.com)

(2) Sign **up** for free membership or login. Click Register link.



Once you've signed **up**, all you'll have to do is sign **Login**. To sign in, key in your user name and password.

(3) Clicking on Register brings you to this screen. Complete. You will have the opportunity to sign up for various publications; read carefully and **un** offers you choose not to accept. Check to Accept Privacy Policy and Submit.

The image shows the 'Free Registration' page on SmartMoney.com. The page is divided into four steps:

- 1. Create a User Name and Password**
  - Enter a User Name:  At least 5 characters or numbers and contain no spaces.
  - Enter a Password:  At least 5 characters or numbers (case sensitive).
  - Confirm Password:
  - Enter an Email Address:  e.g. yourname@yourisp.com
  - Select a Country:  Select From List
- 2. SmartMoney Insider**
  - Yes! I want to make my voice heard as a SmartMoney Insider
- 3. Choose Which SmartMoney Emails You Wish to Receive**
  - Select which SmartMoney emails you wish to receive:
    - Daily Market Summary
    - Weekly Market Summary
    - Earnings Season Newsletter
    - SmartMoney.com Features, Contests and Special Announcements
  - Select the categories below that interest you and receive relevant special offers and information from SmartMoney.com and our sponsors:
    - Stocks & Investing
    - Funds & ETFs
    - Small Business
    - Technology
    - Autos
    - Personal Finance (Retirement, Real Estate, Taxes)
  - Choose an email format:
    - Plain Text
    - HTML (includes graphics)
- 4. Agree to Privacy Policy and Submit**
  - I agree with the [Terms of Service](#) and [Privacy Policy](#)
  -

On the right side of the page, there are several promotional banners and a market data table.

**100 COMMISSION-FREE STOCK & OPTIONS TRADES** \$799 - \$999 STOCK & OPTIONS TRADES FOR QUALIFIED INVESTORS. GET STARTED

**3.00% APY** NO MONTHLY FEES NO MINIMUM BALANCE. A 36-MONTH CD FROM AMERICAN EXPRESS. LEARN MORE NOW

**PERSONAL SAVINGS from American Express**

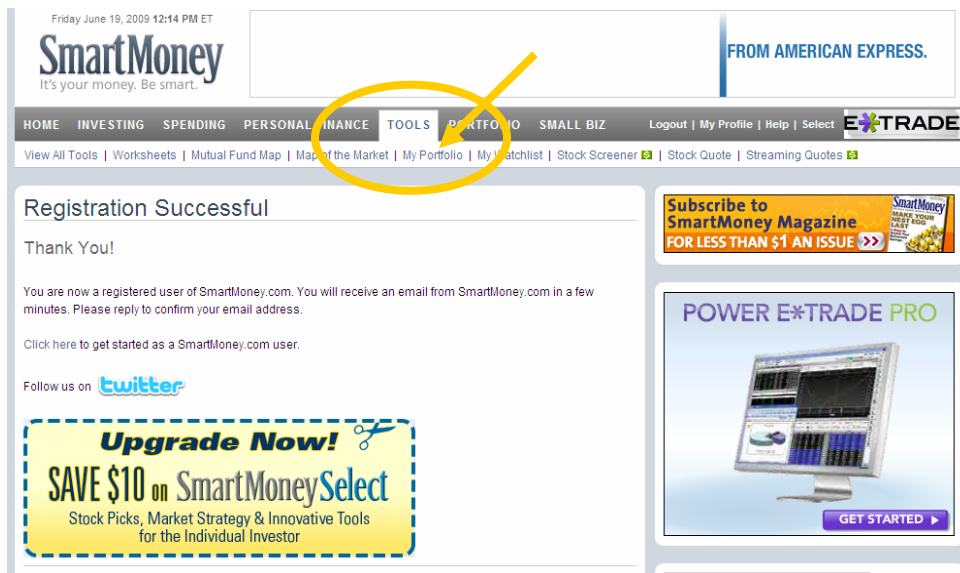
**MARKETS** MY QUOTES MOST ACTIVE

Index	Price	Chg.	% Chg.
DJIA	8579.94	▲ 24.34	0.28%
Nasdaq	1831.81	▲ 24.09	1.33%
S&P 500	923.82	▲ 5.45	0.59%
Russell 2000	515.19	▲ 5.71	1.12%
10 Yr Bond	3.80	▼ -0.03	-0.78%
DJ Total Market Index	9455.94	▲ 62.72	0.67%
S&P 400	580.44	▲ 5.04	0.88%
Nasdaq 100	1473.00	▲ 19.20	1.32%
DJ Transportation	3240.65	▲ 40.37	1.26%

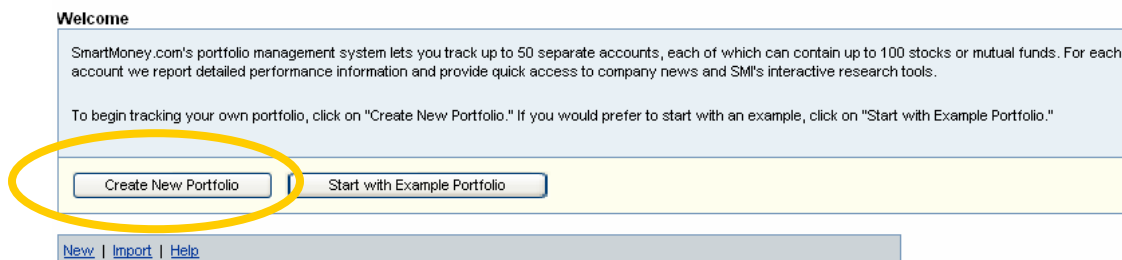
**Already Registered?**

**College Planning**  
7 Places Where College Grads Can Find Work  
About to graduate with no job in sight?

- (4) You will be brought to this page. **Scroll over *Tools* and click *My Portfolio*.**



- (5) Click *Create New Portfolio*.



- (6) Name your portfolio, check *Enter transactions*, and fill in the starting cash balance with the appropriate amount (for the project, \$500,000). **Submit.**

A screenshot of the 'Create New Portfolio' form. The form includes a 'Portfolio Name' field with a placeholder 'Choose a Name', two radio buttons for 'Enter transactions' (selected) and 'Import transactions', and a 'Starting Cash Balance' field with the value '500000'. There are 'Submit' and 'Cancel Changes' buttons at the bottom. To the right of the form, there is a text box explaining the form fields and the 'submit' button. A 'Help' link is visible in the top right corner of the form area.



- (7) You may now start buying stocks, or you can wait until later by clicking *Submit*, which will take you to your portfolio view. To get back to this page from Portfolio view, click *Buy/Sell*.

To purchase stocks now, enter in the stock symbol, number of shares, and either enter the price you have looked up, or **click the price button for the current price to be automatically filled in**. You can purchase all of your stocks now, or come back later and purchase more. You can also sell stocks from this page by changing the transaction type to Sell. Any time you need help click *Help* at the top of the page.


If you choose to purchase more stocks than there are spaces, click *Add More Rows*. Finish purchasing your stocks and Submit.

Portfolio | Transactions | **New** | Buy/Sell | Dividends | Edit | Import | Export | Customize | Help

**STARS Sample Portfolio** View Other Portfolio STARS Sample Portfolio

  Be notified when **your** stock hits **your** price target! [More...](#)

**Only \$1 an issue!**



**SUBSCRIBE NOW »**

**Transactions** [Help](#)

Date	Ticker	Transaction	Shares	Price	Commission	Shares	Avg. Cost
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="11/30/07"/>	<input type="text"/>	Buy <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="11/30/07 price"/>	<input type="text"/>	<input type="text"/>

**Cash:** Add:  Subtract:  Total: \$500,000.00

Use this screen to record buy and sell transactions. After you've entered your buy or sell transactions, click the "submit" button at the bottom of the page. You can add up to 100 stocks or funds in this portfolio. To add more rows, click on "Add More Rows" button. [Click here](#) to find out more about this screen.

Portfolio | Transactions | **New** | Buy/Sell | Dividends | Edit | Import | Export | Customize | Help

Commission  
 This project **does not use** the Commission feature this semester.  
 IF you choose to use the feature, use 1% of the total cost which is the number of shares x trade price. The Commission feature is optional.

- (8) Once you have purchased all of the stocks, you will be back in the portfolio view. In Portfolio view, notice the Value box at the top right. This will highlight the total value and any positive/negative change in your portfolio.

THE WALL STREET JOURNAL Digital Network WSJ.com Market Watch BARRONS All Things Digital. SmartMoney More Search or Quote SEARCH

Friday June 19, 2009 12:23 PM ET

SmartMoney  
It's your money. Be smart.

Help protect your legacy with products from John Hancock roll over to learn more  
Insurance Retirement Investments

HOME INVESTING SPENDING PERSONAL FINANCE TOOLS PORTFOLIO SMALL BIZ Logout My Profile Help Select AMERITRADE

MY PORTFOLIOS: Overview / Summary | June 19, 2009

View other portfolio: June 19, 2009 Create new portfolio | All portfolios | Mobile view | Help

Portfolio Name: June 19, 2009 Portfolio Value: \$499,973.80 Gain / Loss: -\$26.20 (-0.00%) Today's Gain / Loss: -\$26.20 (-0.00%)

June 19, 2009 as of 12:23 PM ET

Major Indexes

Index	Price	Chg.	% Chg.	Volume
DJIA	8553.26	-2.34	-0.03%	312.74M
Nasdaq	1825.31	17.59	0.97%	1373.44M
S&P 500	920.82	2.45	0.27%	2502.68M
10 Yr. Bond Yield %	3.80	-0.03	-0.78%	

Analysis Tools: Performance Map Allocation Analysis Benchmarks Email Alerts Portfolio Report

Portfolio Transactions Buy/Sell Dividends Edit Import Export Customize Save As Excel Print

Ticker

BRK.B		
HD		
JNJ		
Cash		
Realized Gain/Loss		
Total		

Indicates Real-time pricing data.  
Other quotes delayed at least 15 minutes.  
ALL volumes delayed at least 15 minutes.

Initially, your Portfolio view may look similar to this one, which is missing a lot of information. To be sure that you are seeing everything, click on *Customize*. To include more data columns,  $\checkmark$  all of the boxes under the *Include* column. Click *Submit*.

Portfolio Transactions Buy/Sell Dividends Edit Import Export Customize Save As Excel Print

Column	Include	Highlight
Chart	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticker	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
News Headlines	<input checked="" type="checkbox"/>	<input type="checkbox"/>
News	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Shares	<input checked="" type="checkbox"/>	<input type="checkbox"/>
% of Total	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Trade	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Today's Chg.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Today's Chg. %	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Current Value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gain / Loss	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gain / Loss %	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Today's Gain / Loss	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Volume	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please enter the information below to customize your account. Note: All personal information is optional. Click here to edit your user profile.

CHOOSE USER OPTIONS

Include Cash Account

CHOOSE FONT SIZE (FOR HTML VIEW ONLY)

Small  Medium  Large

Submit Cancel Changes

If you would like to edit any transactions you have made, click *Edit* and make any appropriate changes. To buy more stocks, or to sell stocks, click *Buy/Sell*. This is also where you will click if you choose to come back later to purchase.

STARS Sample Portfolio | Views: Performance | Map | Analysis | Allocation | Benchmark | HTML | Java

Chart	Ticker	Company Name	News	Cost	Shares	% of Total	Last Trade	Today's Chg.	Today's Chg. %	Current Value	Gain / Loss	Gain / Loss %	Today's Gain / Loss	Volume	Events	
	AMX	AMERICA MOVIL SAB DE ADS		\$61.66	1,000.00	12.3%	\$61.66	1.59	2.65%	\$61,660.00	+\$0.00	0.00%	+\$1,590.00	6,495,441		
	ANN	Ann Taylor Stores Corp.		\$30.45	1,000.00	6.1%	\$30.45	0.01	0.03%	\$30,450.00	+\$0.00	0.00%	+\$10.00	1,632,646		
	N/A	APPL		\$85.10	1,000.00	17.0%	\$85.10	0.00	0.00%	\$85,100.00	+\$0.00	0.00%	+\$0.00	0		
	D	Dominion Resources Inc. (Virginia)		\$47.23	1,000.00	9.4%	\$47.23	0.31	0.66%	\$47,230.00	+\$0.00	0.00%	+\$310.00	2,881,692	Div	
		GOOG		\$693.00	300.00	41.6%	\$693.00	-4.00	-0.57%	\$207,900.00	+\$0.00	0.00%	-\$1,200.00	7,832,158		
		LUV		\$14.15	1,000.00	2.8%	\$14.15	0.70	5.20%	\$14,150.00	+\$0.00	0.00%	+\$700.00	9,380,302		
Cash						10.7%				\$53,510.00						
Realized Gain/Loss											+\$0.00					
Total											0.28%	\$500,000.00	+\$0.00	0.00%	+\$1,410.00	

All quotes delayed at least 20 minutes. Automatic Refresh: Every 10 minutes.  
 Events\* E=Earnings, U=Upgrades, D=Downgrades, I=Initial Coverage, Sp=Splits, Div=Dividends

News & Press Releases

- AMX** [News](#) | [Press Releases](#)
- Ecuador: America Movil Submits Documents In Service Dispute November 30, 2007 04:01 PM Dow Jones Business News
  - UPDATE: Panama Moves Deadline In Mobile Telephony Auction November 27, 2007 07:12 PM Dow Jones Business News
  - Panama's Asep Moves Deadline In Mobile Telephony Auction November 27, 2007 07:04 PM Dow Jones Business News
- ANN** [News](#) | [Press Releases](#)
- AnnTaylor Stores 3Q EPS 67 Cents Vs EPS 55 Cents November 16, 2007 08:10 AM Dow Jones Business News
  - Ann Taylor Launches New Beauty Collection November 12, 2007 03:52 PM Dow Jones Business News
  - October Retail Sales: Largest Percentage Gainers/Decliners November 08, 2007 10:08 AM Dow Jones Business News
- D** [News](#) | [Press Releases](#)
- Dominion Seeks Proposals For Renewable Energy Projects November 29, 2007 10:25 AM Dow Jones Business News
  - Dominion Files For License To Build 3rd North Anna Reactor November 28, 2007 02:50 PM Dow Jones Business News
  - Eni Starts Production In 3 Gas Fields In Gulf Of Mexico November 21, 2007 06:15 AM Dow Jones Business News

Notice at the bottom of the page, there are news listings and press releases related to specific companies that are in your portfolio. You can use these to help understand why your stocks are gaining or losing each day.

When editing, change number of shares or price (if necessary). Make sure that the price that you use is a current daily price for that stock. Select any you wish to delete. Be cautious when using the *Edit* tool, because it may affect your cash value or portfolio value. Try to use the *Buy/Sell* function instead. When you have finished editing, click Submit.

Edit Your Portfolio [Help](#)

Portfolio Name: STARS Sample Portfolio

Ticker	Shares	Cost	Delete
AMX	1,000.00	\$61.66	<input type="checkbox"/>
ANN	1,000.00	\$30.45	<input type="checkbox"/>
APPL	1,000.00	\$85.10	<input type="checkbox"/>
D	1,000.00	\$47.23	<input type="checkbox"/>
GOOG	300.00	\$693.00	<input type="checkbox"/>
LUV	1,000.00	\$14.15	<input type="checkbox"/>

Cash: \$53,510.00    Realized Gain/Loss: \$0.00

Use this screen to edit the holdings in your portfolio directly. We will not be able to resolve the direct adjustments of the holdings with your past transactions. Therefore it is best to edit transactions instead in the [Transactions](#) view. If you wish to remove this portfolio entirely, click the "Delete Portfolio" button.

Back in Portfolio view, note the [Last Trade](#) column. That is the last price per share. That IS the price per share currently. (Note: The Market is closed on weekends.) Check out Performance, Map, Analysis, Allocation, and Benchmark views for interesting information.

To buy more or sell stocks, click *Buy/Sell*.

- (9) **BE SURE TO SIGN OUT WHEN YOU ARE FINISHED.** Until you manually log out, the site will keep you logged in, allowing others to access your work.

## NOTES AND QUESTIONS

- (1) Refer to the HELP section as needed.

SmartMoney Monday December 3, 2007 11:38 AM ET | U.S. Market close in: 4:22 sm SmallBiz

Logout | Special Offers | Free Newsletters | Help

Build a customized portfolio of ETFs. Upgrade your trading experience today. Fidelity

Search More Options

Quote Site Search

Ticker or Company Name

AMERITRADE TRADE FREE FOR 30 DAYS + GET \$100

Select Portfolio Dec 3, 2007

Your Portfolio: Portfolio

Portfolio | Transactions | New | Buy/Sell | Dividends | Edit | Import | Export | **Custimize** | Help

STARS Sample Portfolio

Value: \$500,085.00

Change: \$85.00

Price Alerts **NEW**

Be notified when your stock hits your price target! More...

Only \$1 an issue! SUBSCRIBE NOW

- (3) **Alerts.** Set these if you would like, but it is likely you'll get bazillions of e-mail messages! (not required for the STARS project)
- (4) Refer to handouts and information on [www.investedok.org](http://www.investedok.org).