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## PSA Presenters Informational Document

Informational Luncheon Meetings are held at one of the several restaurants and historical sites, in the heart of Philadelphia's business, financial, and hotel district.

The schedule generally includes a reception from 11:30 am to noon, during which time members may meet management on an informal basis. This is followed by a luncheon from noon to 12:30 pm, and the presentation from 12:10 to 12:45 pm and Q & A through 1:00 pm at which time the meeting is scheduled to end.

### What Do I Need to Do as a Presenter?

The PSA will handle all arrangements, including securing appropriate facilities, determining the menu and handling all the necessary logistics, which include notifying notices to our members, collecting responses and determining approximate expected attendance for the Association's and the Company's use. If the Company wishes to use audiovisual equipment for its presentation, e.g., PowerPoint, we will arrange to have the equipment available. If we are informed in advance we will also make certain that there are tables, easels and other furniture or equipment needed for displays, reports, products and brochures. Some companies have displays of their products and/or hand out small "mementos" that give us an additional reminder of the luncheon and company program.

### PSA Officers

**President**

Edward J. Tirello, Jr.

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**Vice President**

Rickie Taylor

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**Treasurer**

Calvin Rose

[treasurer@philasecurities.com](mailto:treasurer@philasecurities.com)

**Secretary**

Don Gudhus

[secretary@philasecurities.com](mailto:secretary@philasecurities.com)

### PSA Committees

**PROGRAMS**

Edward J. Tirello Jr. and Richard Rossi

[president@philasecurities.com](mailto:president@philasecurities.com)

rfr12332@msn.com

**MEMBERSHIP**

Rickie Taylor

[therltgroup@gmail.com](mailto:therltgroup@gmail.com)

### **When are Meetings Held?**

The PSA holds its luncheon meetings throughout the year. Normally our meetings are on Tuesdays, Wednesdays or Thursdays but on occasion we do hold them on Mondays or Fridays. In the interest of maximum attendance and the maintenance of continued interest, we try not to schedule more than two meetings in a business week. However, recognizing the realities of business meetings, we are not adamant about this rule. Our experience suggests that attendance does not appreciably decline during the summer months.

We are pleased to work directly with the Company's designated corporate officer or staff person charged with the investment/public relations responsibility and/or we will work closely with the Company's financial or public relations firm representatives.

### **What is The Meeting Schedule?**

Generally, we like the formal remarks to end at about 12:45PM so that questions may be entertained until 1:00PM when we conclude the meeting. If the Company's representatives' schedule permits, they may remain to answer questions individually and meet with those members who do not have pressing afternoon commitments. Attendance varies, of course, depending upon the investment interest in the host Company.

### **Who Can A Presenting Company Invite?**

If the company would like to invite other people such as directors, local plant managers, distributors, other corporate representatives, underwriters, investment analysts or bankers, they may do so themselves. Please send us a list of your invitees. We will have an attendance sheet for members to sign in and you will receive this at the end of your presentation.

### **What is the Cost?**

Each Company requesting to make a presentation before the PSA is expected to bear the cost, which currently averages \$110 per attendee, excluding alcohol. During the past several years, we have hosted anywhere from 20 to 30 companies per year. Naturally, the larger better-known companies tend to attract a larger audience.

Even smaller companies, not listed on a major exchange and not located in the Greater Philadelphia / Delaware Valley area, usually attract a notable audience. The total cost will range from approximately \$4,000 to \$5,000, excluding alcohol and any extra costs for special arrangements or equipment.

If a Company wishes to bulk ship handouts such as annual reports, current information packets, copies of its presentation or mementos, a contact at the venue will be provided to the company to make deliver arrangements.

### **What Else Should Presenters Know?**

We normally have a head table for several of our Officers and those from the Company and/or P/R firm who will be participating in the presentation. Our President acts as host. If the Company wishes to have readable name cards for its Officers, they should provide them. Our President will host and introduce everyone sitting at the head table.

In order to ensure that everything necessary for a successful presentation runs smoothly, the Program Chairman will call the Company or its designated P/R firm two to three weeks prior to the scheduled appearance date to finalize the details.

By that time, we should have received the following information from the Company:

1. Name(s) and title(s) of speakers.
2. Names and number of employees and guests who will attend, including those seated at the head table.
3. A one-paragraph description of the Company and its operations for our website promotions.
4. Audiovisual aids requests and requests for special equipment.
5. Any special requirements for displays or handouts.
6. Anything else that will help us to assist the Company in preparing for a successful meeting.
7. A credit card deposit is required to secure the luncheon reservation at any of our venues. The PSA also has the ability to accept credit cards via Stripe to help make the process as streamlined and as easy as possible.

If desired, the Company may also submit to us a copy of their presentation speech for publication on our web site. The speech must include a legal disclaimer.

We wish to help make the Company's luncheon presentation successful and as enjoyable as possible. Many Companies make the PSA a regular part of their investor relations program, returning every year or two to update the Philadelphia investment community on their Company's progress. To see who has presented before the PSA please navigate to the Programs & Events section on our website.

If you have any questions, contact Edward J. Tirello, Jr. or Richard Rossi:

#### **PROGRAMS**

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