

This introduction was developed to lend credibility to the speaker/facilitator, which can be helpful to set the stage for a successful workshop/presentation.

When our speaker [for presentations] OR facilitator [for workshops], Jim Valentine, was an equity research analyst, the major North American investor polls ranked him among the top three for ten consecutive years in his sector and *Forbes* identified him, as one of the top three among all 2,000 U.S. sell-side analysts. At the height of his career as an analyst, he was asked to take on a newly-created role as Director of Training for Morgan Stanley's Global Research department.

As he was implementing a new global training program for 500 analysts and associates, he realized far too many buy-side and sell-side analysts were approaching this profession without a strategy, which held them back from generating alpha. To remedy this, he began his independent effort by writing the top-selling book *Best Practices for Equity Research Analysts* and then founded AnalystSolutions, to help all buy-side and sell-side analysts **improve their stock picking and receive greater recognition for those calls.**

Please help me welcome, Jim Valentine...