

Old School Value Getting Started



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Disclaimer

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Thank You!

First of all, a **huge thank you** for signing up as an Old School Value member!

I'm confident this spreadsheet will save you hundreds of hours of work over the long run, make you a better analyst, investor and ultimately profiting from your stock picks. I am also positive it will pay for itself the minute you start using it.

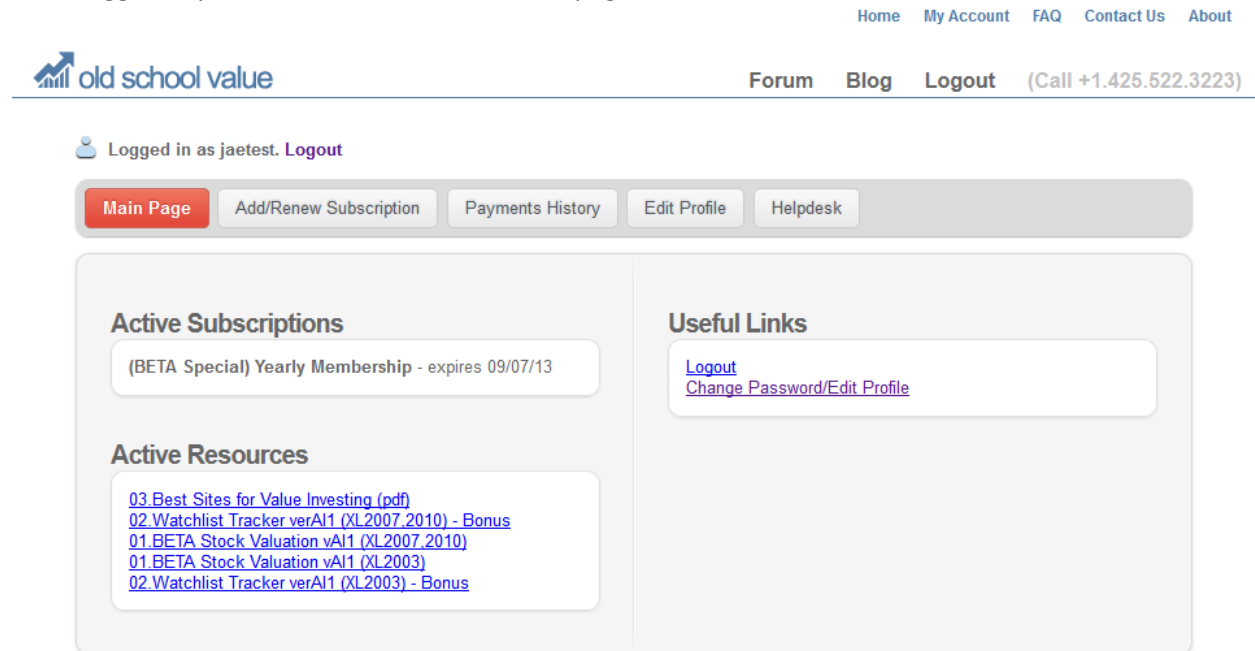
All the most common questions and issues have been addressed in this document so please take the time to go through it if you encounter errors. It is most always likely to be an Excel issue, NOT a spreadsheet issue.

Welcome to Old School Value.

Your Membership Account

To access your account, go to <http://www.oldschoolvalue.com/member/member> and sign in with your login information.

Once logged in you will see the main members page as shown below.

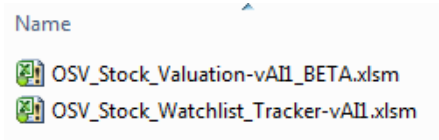


Under “**Active Resources**” click on the link to the stock valuation spreadsheet XL2003, 2007 or 2010 to download.

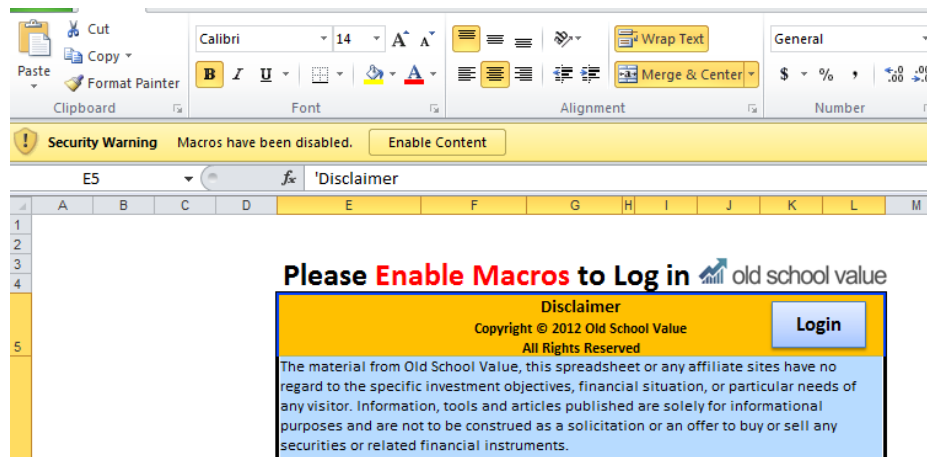
- **Main Page:** View your subscription status and download links
- **Add/Renew Subscription:** You can choose which membership option to subscribe to. Downgrade or upgrade possible.
- **Payments History:** View your invoices and payment history
- **Edit Profile:** Edit your name, password and email
- **Helpdesk:** Submit customer support tickets

Getting Started

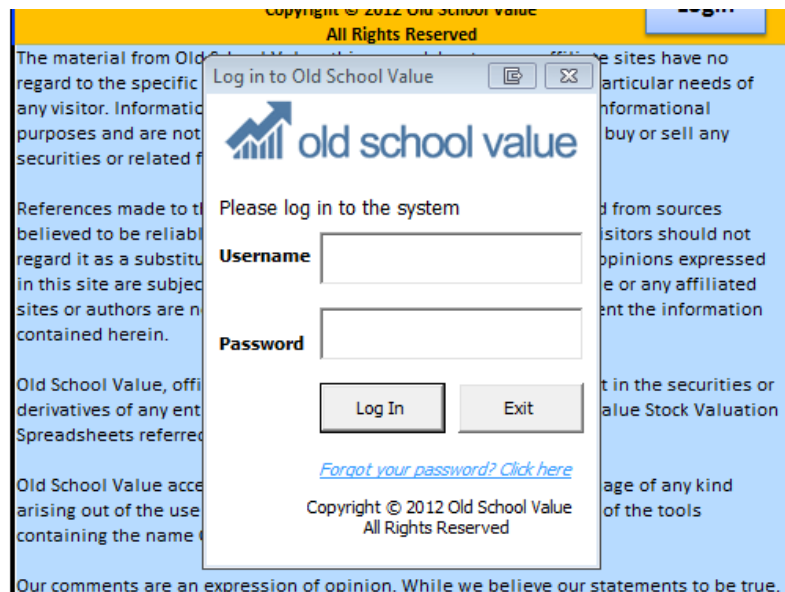
1. Download the stock valuation spreadsheet to your computer or a USB drive for portability



2. Double click to open the stock valuation spreadsheet
3. If you have macros disabled, **enable macros** to start



4. Once macros has been enabled, a login form will appear.



5. Enter your username and password to log in, then enter a stock ticker and away you go.

Frequently Asked Questions

Most of the FAQ have been answered at the [FAQ page](#) but here are the most frequent and important.

Q: Are international stocks supported?

A: No. Only US listed stocks will work. I have yet to find a data provider that provides the same amount of information as US stocks. Financial statement line items are all different which makes analysis difficult.

Q: Who is the data provider?

A: Financial data comes from Hemscott, the same provider for Morningstar.com

Q: Where is the data stored?

A: Data is stored on the spreadsheet until you enter another company ticker. The data is then overwritten. In other words, all data is dynamic and is refreshed to the latest available. If you want to save a copy of the spreadsheet for a specific company, you have the option to save it as a PDF or as another copy.

Q: When are the next fiscal year numbers updated?

A: The spreadsheet is completely dynamic. This means as soon as the updated numbers are available, it will automatically download it. Even if you do not use the spreadsheet for a year, the next time you use it, the latest financial numbers will be displayed.

Q: Will it work for OTC and Pink sheet stocks?

A: Mostly no because OTC and pink sheet stocks do not have enough financial data. However, you have the ability to enter data manually into the financial statements and still make use of the majority of functionality.

Q: Do I need any other subscription to run the program?

A: No extra payment, fees or charges are required. Your payment covers all data and subscription costs.