



CHAPTER EVENTS

The Philadelphia Chapter of BI Newsletter Fall 2022

Volume 2, Issue 3 Fall 2022

President's Corner:

Even though leaves are falling—as well as share prices—we BetterInvesting investors are staying the course. We know that prices will recover. Playing the long game is smart. Our patience with the market will prevail. The skills we have learned and honed are still important to evaluate a stock's fundamentals.

As the season changes, let us embrace cooler temps and be grateful we have cooler heads to deal with economic change.

Sincerely,

Marion McLauchlan

What Is Portfolio Management?

Portfolio management is the art and science of selecting and overseeing a group of investments that meet the long-term financial objectives and risk tolerance of a client, a company, or an institution.

KEY Points

- Portfolio management involves building and overseeing a selection of investments that will meet the long-term financial goals and risk tolerance of an investor.
- Active portfolio management requires strategically buying and selling stocks and other assets to beat the broader market.
- Passive portfolio management seeks to match the returns of the market by mimicking the makeup of a particular index or indexes.

The Philadelphia Chapter will visit your investment club in person or online and provide a review of the club portfolio. Contact Gloria Mankonen at contact@philly.betterinvesting.net

Reference: Investopedia: Portfolio Management Definition by Adam Hayes accessed 9.25.22.

Free Fall 2022 Webinars:

October 27, 2022, from 7:30pm – 8:30pm

Cryptocurrencies: The Good, the Bad and the Ugly by Bill Wagner The amount of information out there today about cryptocurrencies can be overwhelming. In this webinar, we will give some basic background about how cryptocurrencies work with an overview of the blockchain technology that underlies them all. With this knowledge, we can then begin to learn how to analyze some of the crypto assets out there to better identify the "blue chips" from this emerging sector of financial markets.

To register: <https://attendee.gotowebinar.com/register/4216821029043368207>

Dr. Wagner has been a professor of information systems at Villanova University since 1991. While at Villanova he has co-authored four books and over 35 journal articles in various IT-related fields. In 2019 he co-authored the first college textbook on Blockchain which is currently being used by schools and universities around the world. He is also a founding member (2019) of the Tomorrow Fund, one of the first investment funds to focus on Web 3.0 startups.

November 16, 2022, from 7:30pm – 8:30pm

Investment Strategies Before and After Retirement by Gary Ball

This seminar will describe a couple of different investment strategies and answer the question of a member who asked "Should one's investment strategy change when one's retired? We will discuss a strategy for investing for retirement and follow up with a strategy for investing during retirement. We will conclude with a proven retirement model which is practical and easy to implement. It has been used by the author for the past 24 years with virtually no changes.

To register: <https://attendee.gotowebinar.com/register/7855882360075542800>

Gary has been an individual investor for 50 years. He has been affiliated with the BetterInvesting organization (NAIC) since 1984. He served as President of the Puget Sound Chapter of BetterInvesting from 1999 until 2002. He served as a National Director for BetterInvesting from 2007 until 2017.

He has taught BetterInvesting tools at investment seminars in the northwest for nearly 35 years and has been a seminar presenter every year from 1991 through 2017 at BetterInvesting national conventions. He has been featured in *Smart Money*, *Consumers Digest* and *Fortune* magazines.

In 1998 he retired as Manager of Investor Relations for Fluke Corporation, an electronics company in Everett, Washington. Prior to that, he held various engineering management positions within the company.

He has served on the adjunct faculty at the University of Washington and taught investment classes in the business school. Gary holds a master's degree in electrical engineering.

Introduction of Investing with Fundamentals of the BetterInvesting Stock Analysis Methodology

November 5, 2022, from 9am-3pm at the Community Center at Giant in Willow Grove, 315 York Rd. Willow Grove

This Class is an introduction to investing and the BetterInvesting Stock Analysis methodology. You will learn to complete a Stock Selection Guide (SSG) while increasing your knowledge of investment and financial terminology. You will learn to analyze a company to determine whether to buy, sell, or hold, and how to use data produced by independent analysts such as Morning Star and Value Line. You will obtain a basic knowledge of stock analysis using the on-line SSG Core and the SSG Plus.

Fee: \$15

To register by Eventbrite, go to link below:

www.eventbrite.com/e/investing-with-fundamentals-of-the-betterinvesting-stock-analysis-tickets

To register by Mail use information below:

Make check payable to: Philadelphia Area of BI

Gloria Mankonen, 1106 Cowpath Rd., Hatfield, PA 19440

For more information you can contact:

Gloria Mankonen at: contact@philly.betterinvesting.net

Investor Day with Doug Gerlach

At The Community Center

December 3, 2022, from 9:00am - 4:00pm

Super Giant Food Store

315 York Road
Willow Grove, PA 19090

Doug Gerlach is the President of ICLUB Central Inc., a wholly owned subsidiary of BetterInvesting and makers of tools for investors and investment clubs, including Toolkit 6, StockCentral.com, MyStockProspector.com, MyStockPortfolio.com, Club Accounting for Windows, and myICLUB.com

Plans for the day!

Build a Better Stock Portfolio in 10 days.

Can you spare an hour or two a day for 10 days to make your stock portfolio perform better? Learn the most important considerations when reviewing your portfolio in order to ensure that you're reaching your investment objectives, managing the level of risk in your holdings, and optimizing your returns -- all in 10 days.

Investing in Stocks that Don't Fit the BI model.

BetterInvesting's stock analysis methodology offers the advantages of a disciplined approach to investing that can be implemented successfully by any investor or investment club. But what about all the stocks that seem to always be rising in price but "don't look good" on the Stock Selection Guide? You wouldn't hammer a nail with a screwdriver, so you need to have the right tool for the right job. If you want to invest in stocks that don't fit the BetterInvesting model, here are the things you should consider.

Closing of the club taxes for 2022. Are there any new rules?

Stock Doctor: Club Portfolio Reviews.

For any clubs wanting to submit their club portfolio for Doug to review, contact Gloria Mankonen & request the Excel Format form to complete. See email & phone # below.

Open to the Public

Cost \$35-Lunch Included

To pay by Eventbrite click the link below:

www.eventbrite.com/e/investor-day-with-doug-gerlach-tickets

To pay by check make the check out to Philadelphia Area Chapter of BI

For More Information or to register CONTACT:

Gloria Mankonen (contact@philly.betterinvesting.net) or call 215-796-1214

Saturday, December 3, 2022

9:00am-4:00pm
Registration
Form

Name _____ BI Member Yes No

Address _____

City/State/Zip _____

Telephone _____ Email _____

Club Name _____ BI # _____

ADDITIONAL NAMES

Name _____

Tele/email _____

Name _____

Tele/email _____

Name _____

Tele/email _____

Cost \$35 per person (includes lunch) for BetterInvesting Members & Non-Members

Amount Paid _____ (Make check payable to Philadelphia Area Chapter of BI)

Mail payment(s) to:

Philadelphia Area Chapter BetterInvesting
C/O Gloria Mankonen
1106 Cowpath Road
Hatfield, PA 19440