

# **Congratulation 2024 Certificate Clubs**



## **40 Year Clubs**

INVESTMENTS UNLIMITED INVESTORS INVESTMENT AAUW

## **30 Year Clubs**

MARKET MINDERS INVESTMENT CLUB

WOMEN INVESTMENT NETWORK INVESTMENT CLUB

32 TICKS INVESTMENT CLUB OF OAKLAND

MMM INVESTMENT CLUB

BAY AREA BULLS INVESTMENT CLUB

WESTERN INVESTMENT GROUP INVESTMENT CLUB

MONEY MUSERS INVESTMENT CLUB

WALL STREET WEST INVESTORS INVESTMENT CLUB



## **25 Year Clubs**

CYBER CORP INVESTMENT CLUB

## **5 Year Club**

FABRIC INVESTMENT CLUB

***These Clubs were from all over the our region:***

*Walnut Creek, Livermore, Piedmont, Pleasanton, Martinez, San Rafael,  
Napa, Berkeley, Richmond Redwood Valley*



# Resources for Members

---

## 2024 SF Bay Area Chapter Investor Education Day

### SF Chapter Directors

[Craigbraemer1@gmail.com](mailto:Craigbraemer1@gmail.com)



# Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced. The securities of companies referenced or featured in the seminar materials are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by BetterInvesting™ / National Association of Investors™. The views expressed are those of the instructors, commentators, guests and participants, as the case may be, and do not necessarily represent those of BetterInvesting. Investors should conduct their own review and analysis of any company of interest before making an investment decision.
- Securities discussed may be held by the instructors in their own personal portfolios or in those of their clients. BetterInvesting presenters and volunteers are held to a strict code of conduct that precludes benefitting financially from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of BetterInvesting or the Director of Chapter Relations.
- This presentation may contain images of websites and products or services not endorsed by BetterInvesting. The presenter is not endorsing or promoting the use of these websites, products or services.
- **We may be recording this session for our future use.**

National Association of Investors™, BetterInvesting™ and the BetterInvesting™ Icon are trademarks/registered trademarks.  
All rights reserved. © 2022 BetterInvesting™.



# Content

- Local Resources
  - SF Board of Directors
  - Local classes
  - Club visits
  - SF Model Club
- National Resources – Education and stock ideas
  - Video library
  - First Cut Reports
  - SSG Stock Search Engine
  - Club Connect – [NEW!](#)
- Summary

# www.betterinvesting.org/chapters/san-francisco-bay-area

Home > Chapters > San Francisco Bay Area Chapter

San Francisco Bay Area Chapter

Local Events

Contacts

Model Investment Club

Visit-A-Club

Investment Club Support

News & Articles

Volunteering



The San Francisco Bay Area Chapter of BetterInvesting welcomes you as a member of BetterInvesting. As a member of BetterInvesting you are automatically a member of your local BI chapter, at no extra cost!

The San Francisco Bay Area Chapter serves San Francisco, Oakland, Walnut Creek, San Mateo, San Rafael, Santa Rosa, Napa, Vallejo, Eureka, Menlo Park, Napa and Pleasanton. We are chartered by the National Board of BetterInvesting and staffed with volunteers, responsible for carrying out the mission of BetterInvesting; to provide investment education for local investors, help them learn the BetterInvesting investment principles and tools as well as assist investment clubs with management and accounting. We accomplish this goal with investment educational seminars, workshops, and club visits. [Click here](#) for more information.

Our Chapter's mission is to educate, mentor and support all investors: individual members, investment club members, and potential investors using BetterInvesting principles. The Chapter offers classes and special events on topics from investment basics to club accounting. You can always find the most current information about our activities by clicking on [Local Events](#).

*SF Directors – 12 Volunteers  
Local classes – in-person and virtual  
Club visits – let us come visit your club!*



# SF Model Club

- Currently 17 members.
- Wide spectrum of experience and backgrounds among members.
- Meets the second Thursday of every month.
- We meet virtually for all meetings and on occasion in-person.
- Started in 2011.

# San Francisco Model Club Portfolio – 10/8/2024

	Shares Held	Cost Basis per Share	Total Cost Basis	Price per Share	Market Value	Unrealized Gain/(Loss)	Percent of Total
<b>Adobe Systems Inc</b> (ADBE)	22.0000	492.4882	10,834.74	487.3000	10,720.60	(114.14)	6.9%
<b>Apple Inc</b> (AAPL)	88.0000	23.1949	2,041.15	221.6900	19,508.73	17,467.58	12.5%
<b>Asml Holding Drc</b> (ASML)	3.0000	862.1100	2,586.33	817.2500	2,451.75	(134.58)	1.6%
<b>Charles Schwab Corp</b> (SCHW)	225.0000	41.7591	9,395.80	64.2900	14,465.25	5,069.45	9.3%
<b>Intuitive Surgical Inc</b> (ISRG)	29.0000	84.3938	2,447.42	471.2300	13,665.67	11,218.25	8.8%
<b>Marine Products Cp</b> (MPX)	555.0000	15.8046	8,771.55	9.5200	5,283.60	(3,487.95)	3.4%
<b>Markel Group Inc</b> (MKL)	9.0000	1,201.7322	10,815.59	1,549.8700	13,948.83	3,133.24	9.0%
<b>MarketAxess Holdings Inc</b> (MKTX)	38.0000	238.9303	9,079.35	273.7600	10,402.88	1,323.53	6.7%
<b>Miller Industries Inc</b> (MLR)	197.0000	33.6793	6,634.82	62.4600	12,304.62	5,669.80	7.9%
<b>Old Dominion Freight Lines Inc</b> (ODFL)	48.0000	46.7631	2,244.63	188.5800	9,051.84	6,807.21	5.8%
<b>Paycom Software Inc</b> (PAYC)	20.0000	170.8315	3,416.63	163.6100	3,272.20	(144.43)	2.1%
<b>Ulta Beauty Inc</b> (ULTA)	31.0000	307.4735	9,531.68	370.0100	11,470.31	1,938.63	7.4%
<b>VISA Inc</b> (V)	44.0000	72.1971	3,176.67	273.7900	12,046.75	8,870.08	7.7%
<b>Vertex Pharmaceutical</b> (VRTX)	33.0000	264.2194	8,719.24	448.6000	14,803.80	6,084.56	9.5%
			<b>89,695.60</b>		<b>153,396.83</b>	<b>63,701.23</b>	<b>98.5%</b>

Cash Account	Total Cost Basis	Market Value	Unrealized Gain/(Loss)	Percent of Total
<b>ETrade Securities LLC</b>	2,264.89	2,264.89	0.00	1.5%
	<b>2,264.89</b>	<b>2,264.89</b>	<b>0.00</b>	<b>1.5%</b>
<b>Total Securities and Cash Accounts</b>	91,960.49	155,661.72	63,701.23	100.0%

Total Number of Valuation Units to Date      4,410.758563  
 Value of One Unit      \$      35.291371



# National Resources

- BetterInvesting Magazine
- Over 100 Investment Education Videos
  - TickerTalk and their bite-sized discussions
  - StockUp webinars on investment topics
- First Cut Stock Reports
- SSG Stock Search Engine Tools
- Many sources of stock ideas
- Highly awarded investment newsletters



# National Resources



HOME

WELCOME TO  
BETTERINVESTING

LEARNING  
CENTER

FIND GREAT  
STOCKS

ONLINE  
TOOLS

INVESTMENT  
CLUBS

OUR  
COMMUNITY

## Online Tools

Learn about our online stock selection tools.

GET STARTED



ONLINE TOOLS



LEARNING  
CENTER



MEMBER  
BENEFITS



INVESTMENT  
CLUBS



## Online Tools

Launch SSG - Enter Ticker Here

GO



SCG

My Studies

CR

Don't have access? Free, limited trial version

?

## Most Active Stocks

The top 10 companies our members are investing in (ranked by combined buys and sells) are:

	Buy/Sell
1. <a href="#">Amazon.com (AMZN)</a>	187-24
2. <a href="#">Apple (AAPL)</a>	98-41
3. <a href="#">Microsoft (MSFT)</a>	108-27
4. <a href="#">Ford Motor (F)</a>	114-20

## First Cut Stock Reports

Every week, members from across the country share new stock studies.

VIEW ALL



# National Video Learning Library

## Stock Selection Programs

Video series that explore all aspects of stock selection and the Stock Selection Guide (SSG).



## Regularly Scheduled Programs

Regular programs that our members love.



# First Cut Stock Reports



[HOME](#)

[WELCOME TO  
BETTERINVESTING](#)

[LEARNING  
CENTER](#) ▾

[FIND GREAT  
STOCKS](#) ▾

[ONLINE  
TOOLS](#) ▾

[INVESTMENT  
CLUBS](#) ▾

[COMMUNITY](#)

[Home](#) > [Members](#) > [Find Great Stocks](#) > First Cut Stock Reports

## First Cut Stock Reports

First Cut Stock Reports are created by BetterInvesting members on good quality companies. These stock reports consist of a completed Stock Selection Guide (SSG) showing the judgments made by the author, and a written report sharing why each judgment was made. Use these reports to find potential investments and to compare your SSG with others from our community of investors.

The First Cut Stock Report template (DOCX) is an easy-to-use form providing a simple format to capture your rationale and thoughts about your completed SSG. Complete instructions to submit a First Cut Stock Report are included in the template.



[DOWNLOAD FIRST CUT STOCK REPORT TEMPLATE](#)

Choose 'VIEW' to see all First Cut reports for a company.

[Company Name](#) ▾

[Ticker](#) ▾

[Sector](#) ▾

[Size](#) ▾

[Studies](#) ▾

[Latest Study](#) ▾



# SSGPlus Stock Search Engine Tools

## Online Tools

Launch SSG - Enter Ticker Here

Don't have access? Free, limited trial version

BETTERINVESTING SSG PLUS

Portfolios and Studies

Portfolios

Show 10 entries

Actions

---

BETTERINVESTING SSG PLUS

Search for a Company

**Search Criteria**

9 Yr Sales Growth (%):

9 Yr Earnings Growth (%):

5 Yr EPS R-squared:

Size:

Sector:

Dividend Yield (%):

Pre-Tax Profit Trend:

Return on Equity Trend:

Morningstar Growth Grade:

Morningstar Profit. Grade:

Morningstar Financial Health:

PE / Historical EPS Growth:

Traded Exchange:

**Results**

**Predefined Screens**

Looking for more in-depth screening? Check out MyStockProspector.com

**Filtered List**

**Ticker Heat Map**

FAST	GE	CBI
AL	CAT	TRN
PCP	LUV	GWR
FDS	BA	CHRW
		DHR
		CSX
		SRCL
		MMM
		UNP
		DE

A resource of stock ideas based on the top 100 studies created by members in the last 90 days.

# Investment Club Connect – New!!!

[Home](#) > [Explore Stock Investment Clubs](#) > [Find an Investment Club to Join](#)

Explore Stock Investment Clubs

Learn About Investment Clubs

How to Start an Investment Club

Attend an Investment Club Meeting

Find an Investment Club to Join

Investment Club Accounting

## Find an Investment Club to Join

### Investment Club Connect

BetterInvesting members enjoy exclusive access to our Club Connect program—a unique opportunity designed to connect like-minded individuals with investment clubs nationwide. Please note that Club Connect participation is exclusive to [BetterInvesting members](#).

#### About Club Connect

**Effortless Connection:** Club Connect simplifies the process of joining an investment club. BetterInvesting members can connect with clubs actively looking to add new members.

**Tailored Matches:** Our program uses custom matching technology to consider factors such as location, gender, and other preferences, ensuring that individuals are introduced to clubs that align with their investment goals and style.

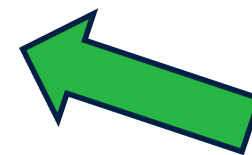
**Confidential Matching:** Your information is securely stored, and only shared with clubs that match your preferences. Your privacy is our priority.

#### How It Works:

- 1. BetterInvesting Membership:** To participate in Club Connect, you need to be a BetterInvesting member. If you're not a member yet, consider [joining to unlock this exclusive benefit](#).
- 2. Registration:** Once a member, register for Club Connect. The process is quick, easy, and a complimentary service for BetterInvesting members.
- 3. Connect:** When a club reaches out directly, remember, there's no obligation—your decision to join is entirely in your hands.



Investment  
Club *Connect*



Try us FREE for 30 Days! Join BetterInvesting and Get Started

# Summary

- There are lots of resources and videos for investors both at the local and national level.
- Consider Club Connect to find new members.
- See how your fellow BI members are investing with both First Cut and the SSGPlus Search Engine.
- If you want to join your volunteer Board let us know and expand your investment knowledge.

---

**Question or Comments?**

*Or*

*Time for door prizes.*

Craigbraemer1@gmail.com

# Spread the Word

During these uncertain times, everyone could use some financial security. Invite your friends, family, and co-workers to try BetterInvesting free for 90 days.

[www.betterinvesting.org/freetrial](http://www.betterinvesting.org/freetrial)



## Please Review Us on Social Media

When you give BetterInvesting a **5-star review**, it helps to further our mission by letting others know you found value in our content.

[www.BetterInvesting.org/Review](http://www.BetterInvesting.org/Review)

