

June 15, 2024

WELCOME!

Golden West Chapter
Annual Meeting and Education Event



June 15, 2024


Better Together:

Engaging with the BetterInvesting
Community



Agenda

- Meet the chapter
- Community of volunteers
- Connect with the community
- What's Happening in the Community
- Education: Community Tools in the Online Tools
- Opportunity to engage



Prize Drawing #1

- ★ **SSG Plus membership or upgrade (\$112 value)**
- ★ **Investment Club Operations Handbook (\$25)**
Amazon Gift Card (\$25)





BETTER INVESTING™
Educating Investors Since 1951


**Non-Profit
Volunteer Based
Member Driven**

4 Main Principles:

- Invest regularly
- Buy Quality Growth Companies
- Reinvest all earnings
- Diversify












Golden West Chapter

The BI Golden West Chapter (BIGW) supports and serves clubs and individual investors from L.A. to San Diego to Southern Nevada.




- Los Angeles County
- Orange County
- San Diego County
- Riverside County
- San Bernardino County
- Imperial County
- Southern Nevada (Las Vegas)

Meet Your Community

 <small>Linda Robins, President</small>	 <small>Virginia Cooper, Secretary</small>	 <small>Anita Widmayer, Treasurer</small>	 <small>Frank Palano</small>
 <small>Richard Raser</small>	 <small>Dori Raser</small>	 <small>Marcia Couey</small>	 <small>Linda Brown</small>
 <small>Roxanne Brazill</small>	 <small>Brandon Mitchell</small>	 <small>Jayne DorVito</small>	

**Directors
and
Volunteers**



Volunteer Anniversaries

Marcia Couey 20-years of service

Anita Widmayer 20-years of service



The Irving S. Kaplan / Ronald F. Bruyn Award for Excellence

Recognizing Outstanding Service to
The Golden West Chapter of BetterInvesting



Elections Slate

Directors to be elected to a 3 year term:

Linda Robins



Treasurer's Report

- We ended last fiscal year (Sept. 30, 2023) with a net operating income of \$-172.45.
- YTD our financial results reflect a net operating income of \$331.42
- We maintain a healthy cash position, but we continue to look for opportunities to generate income.

Connect with the Community

Become a Volunteer

Tell me and I forget, teach me and I may remember, involve me and I learn. — Benjamin Franklin

Our Volunteers have experienced this first hand as they learn new skills or hone skills they already have while helping to educate others about BetterInvesting principles. You don't have to be an investment expert to volunteer. In fact, becoming a Board member is the best way to learn.

Some Benefits of Volunteering

- Enjoy company of like minded individuals & Learn more about investing
- Attend chapter education programs free of charge
- Free & discounted National training programs
- Complimentary upgrade to SSG Core and Plus



Connect with the Community

Become a Volunteer

Golden West Chapter currently needs people who are interested and/or have expertise in:

- Future leadership
- Creating written content for newsletters/brochures
- Social Media
- Google docs/sheets
- Assistant to Secretary or Treasurer
- Advertising/Media

We have fun doing what we do and always learn a lot in the process! Our board meetings are held online on the second Thursday of each month at 3 PM.



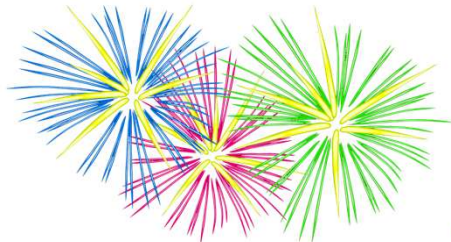
Prize Drawing #2

- ★ Online subscription to **MyStockProspector.com** (\$60 value)
- ★ **SSG and Portfolio Magic Book** (\$17)
SSG Plus membership or upgrade (\$112)



Celebrating Community

Happy Anniversary to Our Clubs!



Celebrating Community

Club Anniversaries

- 10 YEARS**
Global Investments Associates
- 15 Years**
Go Investment Club
- 20 Years**
Two Rivers Investment Club





Celebrating Community

Club Anniversaries

10 YEARS Global Investments Associates	25 Years Y 2 K Investment Club
15 Years Go Investment Club	30 Years MAM\$ Makeki Investment Club
20 Years Two Rivers Investment Club	35 Years America's Finest City Inv Club

Celebrating Community

Club Portfolio Contest


- 7 clubs participating
- 39 unique stocks followed

Club Portfolio Contest

AND THE WINNERS ARE . . .

Club Portfolio Contest Results

THIRD PLACE
Fast Forward Investment Club



Club Portfolio Contest Results

SECOND PLACE
Gelt Gals

THIRD PLACE
Fast Forward Investment Club



Club Portfolio Contest Results

FIRST PLACE
Sum Seekers

SECOND PLACE
Gelt Gals

THIRD PLACE
Fast Forward Investment Club



Club Portfolio Contest

It's not too late to join the 2024-2025 contest!

Enter via form today at the meeting or online until midnight




Supporting the Community

- Club Visits
- Young Club Support
- New Members Support
- Golden West Model Investment Club
- First Friday



What's Happening in the Community

Planned Monthly Chapter Events

Golden West Model Investment Club – 9:00 am -11:15 am
2nd Saturday Online (July 13 for next month)

First Friday – 5:30 pm - 6:30 pm
1st Friday Online

Register at:

www.betterinvesting.org/chapters/goldenwest/local-events



What's Happening in the Community

Planned Chapter Events

Mark your Calendars!

June 27th - Webinar: *TickerTalk:*

AI Insight - Learning a New Language
Video Learning Library - Features and Functions
Five in Five (stock ideas)

July 29th - Webinar - *Stock Investing Made Easy Series:*
Every Picture Tells a Story



Keeping You Informed

- Monthly event emails
- Quarterly Newsletter
- Welcome Letters to New Members
- Chapter Webpage:

www.betterinvesting.org/goldenwest

To make sure you don't miss out on any information or educational opportunity, be sure to sign up to receive emails from BetterInvesting and the chapter:

Once you login to BI, go to MY ACCOUNT and select Email Subscription.



Prize Drawing #3

- ★ Online subscription to StockCentral.com (\$125)
- ★ Using Portfolio Management Wisdom Handbook (\$25)
- ★ One Up on Wall Street by Peter Lynch (\$10)
- ★ Amazon gift card (\$50)



Exploring the Online Community



Closing Remarks



Keeping Us Informed

- What can we do to better serve you as individual investors?
- How can we help your club?

Our Chapter is Here to Serve You

Email: Contact@goldenwest.betterinvesting.net



Prize Drawing #4

By completing the Meeting Survey you will be entered into a drawing to win:

★ Online subscription to StockCentral.com (\$125)

The winner will be notified by email.



Make a Difference!

Have you benefited from BetterInvesting?

Introduce our unique investment education to others!

Share BetterInvesting materials With your family and friends!

BetterInvesting.org/InvestBetter



THANK YOU!

Have a wonderful evening!

Email: contact@goldenwest.betterinvesting.net
Website: betterinvesting.org/chapters/goldenwest