

**CHICAGOLAND CHAPTER NEWSLETTER**  
*Serving Chicago and North/South/West Suburban Counties & Beyond*

**PRESIDENT'S MESSAGE**

**The dog days of summer.** This phrase evokes images of long, hot days and a slower pace to life. However, as BetterInvestors we know that the financial markets do not necessarily fit this profile. In June 2024, the S&P 500 rose 3.47%, bringing its YTD return to 14.48%. The Dow Jones Industrial Average hit a new high, crossing 40,000 points for the first time in July 2024. Finally, the Nasdaq Composite reached a new high of 18,647 on July 10th and has a YTD return of 23.63%.

The Chicagoland chapter directors have also been busy this summer. This pace began in May with the **2024 BetterInvesting National Convention (BINC) in Chicago** held at the Marriott O'Hare Hotel. The chapter was involved in convention planning, authoring an article for *BetterInvesting* magazine and having two instructors teach at the event. I was encouraged by the substantial number of attendees at the convention but equally as important, the representation of young people participating in BINC. Attendees were eager to learn the latest in investing and mingle with old friends and new acquaintances, talking stocks and comparing notes.

This energy carried over in June during the chapter's **annual planning meeting**. This planning meeting takes place during the summer months to strategize activities for the BI fiscal year 2024-25, line up speakers and determine education sessions, as well as set goals for member communications and club visits. Ideas for the upcoming year including:

- A return of 1-2 in-person classes. We will continue to offer online education given the geographic reach of the chapter.
- Add more presenters to the popular Stock Discussion Group to assist Paul Rom and add different points of view.
- All directors submit First Cuts for publication in *BI Weekly*.
- Schedule a national speaker to our educational calendar.
- Investigate community calendars or church notices where BI might participate in local programs.
- Hold a meet and greet where members can talk to chapter directors.

We will continue to refine our chapter goals throughout the summer months. If you have any ideas you would like to share, please send us an email at [contact@betterinvesting.chicagoland.net](mailto:contact@betterinvesting.chicagoland.net).

Sheryl Carter, President  
Chicagoland Chapter of BetterInvesting

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## Milestone Anniversaries of Chicagoland Chapter Clubs

**The following** Chicagoland chapter clubs are celebrating milestone anniversaries (defined by five-year increments) and have received anniversary certificates from home office. We wish to acknowledge these clubs and congratulate them all on their hard work and longevity. *Would you like to have your club featured in the Chicagoland chapter's newsletter?* We can write a short article about your club's success. Let your fellow BetterInvestors know what it means to be a member in this community.

### 5 Years

Sunrise Investment Partners

### 15 Years

20 Prosperous Pearls

### 20 Years

Dynamic Urban Vision

Lofty Investment Club

### 25 Years

Brickton Partners

Quad C's Investment Club

Bluffers Investment Club

SOS Investment Club

F I C

B Sharp Investors

Preferred Group

Blue Chip Investment Group

### 30 Years

Rookie Investment Club

### 35 Years

Tomorrow's Tycoons

### 50 Years

Tree Town Investors

### 55 Years

Ticker Tapette Investment Club



## 2024 BINC in Chicago – Learning, Networking and Excitement

Chicago provided the perfect backdrop for the 71<sup>st</sup> annual BetterInvesting National Convention (BINC) held at the Marriott O’Hare Hotel. The conference drew partners from all over the country. Not only did the event have over 300 members, more than 70 attendees were first-time attendees to BINC. Based on attendee evaluation, the event did not disappoint. With over 60 education sessions on several investment topics and opportunities to network with fellow attendees, BINC in Chicago provided something for everyone.

### Off to a Great Start

BINC kicked off with a surprise. Deane Jaeger, 2024 BINC Chair, provided welcoming remarks and asked all veterans in the audience to assist in BINC’s opening ceremonies by asking them to join him on stage. After our veterans received a standing ovation, Bobbie Kincaid, BIVA Board Member, provided historical stories about the ringing of the opening bell at the New York Stock Exchange. She asked Matt Holz to officially ring the bell in celebration of Matt’s club, 1400 Investment Club, 70<sup>th</sup> anniversary. Upon the ringing of the bell, BINC activities began with a corporate presentation by Chris Barry of NNN REIT, followed by the always entertaining “Let’s Talk Stock” panel.



### Exceptional Education

It’s all about education when it comes to BINC and the 2024 BINC in Chicago was no exception. The theme of the convention was “Learn by Doing” and classes encouraged attendee engagement and hands-on learning. To reinforce this theme, 2024 BINC offered four class series. Many members may be familiar with the Beginner Bootcamp series which walks new investors through the BI methodology and building a stock selection guide. Due to the hands-on nature of these classes, pre-registration was required. Other series were Beyond Beginner, Building on Beyond Beginner and High Net-Worth Conversations.

2024 BINC highlighted many other classes, lectures, and panels featuring a variety of investment topics. Led by BI’s nationally recognized instructors, topics ranged from researching and analyzing stocks, stock options, portfolio management, dividend investing and many more tips and investing ideas. The Chicagoland chapter was proudly represented at the convention by directors **Akari Muhisani** teaching “How to Hack Your 401K” and **Ray Giese** teaching “Investing in Dividend Stocks” and “Using Mutual Funds & ETFs to Build Out Your Portfolio”.

## 2024 BINC in Chicago (cont'd.)



### Something New – BINC Café

New to 2024 BINC, attendees were treated to BINC Café, a venue that allowed members to relax, talk to friends and experts, enjoy refreshments and have some fun. Attendees still had opportunities to talk directly with corporate sponsors, FINRA, SEC, BI home office and ICLUB staff members. Other Café items included a photo booth, BINC Jeopardy and “Ask the Experts” tables, manned by fellow directors from chapters around the country. Attendees left the Café invigorated and ready to enjoy the next round of classes.



### Corporate Presentations, Invited Speakers, Door Prizes and More

Where would we be without the wonderful corporate sponsors who support the retail investor. Meal presentations included Safehold Inc., AFLAC, NNN REIT, and newcomer Lead-Real Estate Co. Ltd. Attendees were also treated to invited speakers during the convention. Financial literacy expert, author and NAIC board member, Jackie Cummings Koski discussed F.I.R.E. – A Money Journey, and Sam Stovall was the Saturday evening speaker filled with investment insights.

After a half-day of classes on Sunday, the conference closed with thank you comments to attendees for their support. 2024 BINC was everything members could hope for: top-notch education, a chance to catch up with old friends and leave the event feeling confident and ready to put new skills to the test the lessons learned in Chicago. Stay tuned to *BetterInvesting* magazine for plans that are already underway for future BINCs in 2025 and beyond.





### Have Your Club's Portfolio Reviewed

Ever wonder how well your club is doing? Portfolio evaluations are performed by Chicagoland chapter directors who analyze your club's portfolio and review the results at your club meeting. The analysis is provided using BetterInvesting tools, including portfolio management analysis and director expertise to evaluate your portfolio. We will assist in determining if your portfolio is meeting your club's goals. This is an educational tool offered free of charge to your club.

Take advantage of this service for your club by emailing us at [contact@betterinvesting.chicagoland.net](mailto:contact@betterinvesting.chicagoland.net).

Want to join the BetterInvesting volunteer nation? The Chicagoland chapter is always looking for energetic people who are willing to work in a team, pitch in and have fun in the process. Not only will you share time with like-minded people, but you will also learn a tremendous amount about investing and BetterInvesting methods. Are you interested in hearing more? Email us at [contact@betterinvesting.chicagoland.net](mailto:contact@betterinvesting.chicagoland.net).

## Chicagoland Directors and Associate Directors

Bill Barnes	Mary Jaffe	Akari Muhisani	Paul Rom	Shirley Truss
Sheryl Carter	Doug Kurtz	Wilma Rice	Sue Spurlin	Rosemary Wyche
Ray Giese	Judy Moran			

### Important Notice to our Readers

**BetterInvesting is a non-profit educational organization that sponsors programs and provides information through their local volunteer chapters for the education and use of individual investors and investment club members. BetterInvesting neither recommends nor endorses specific securities.**