



# Online Chapter Mentoring Workshop

17 November 2021

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# Tonight's Panel of Experts

Bob Houle

Linda Hunt

Howard Johnson

Sriram Madabushi

Al Molter

Dan Perlman

Phil Sudore

Your Host, Chris McCarron

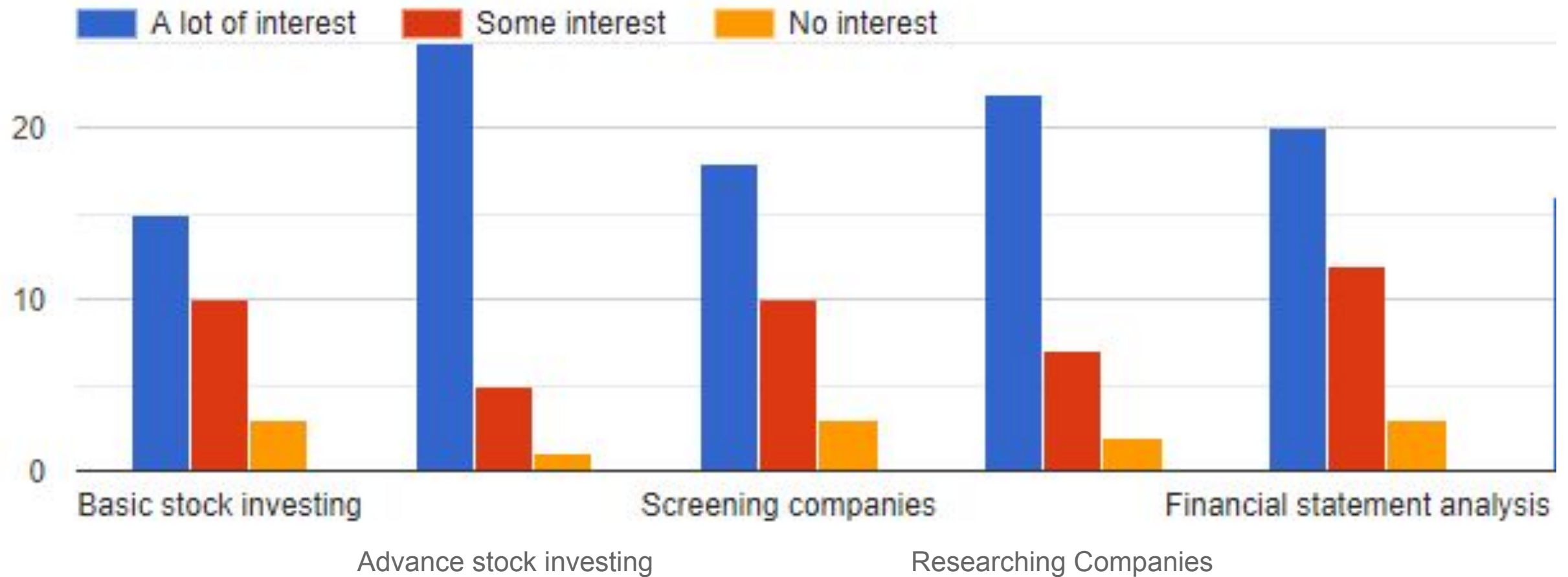
# Tonight's Plan

**You ask**

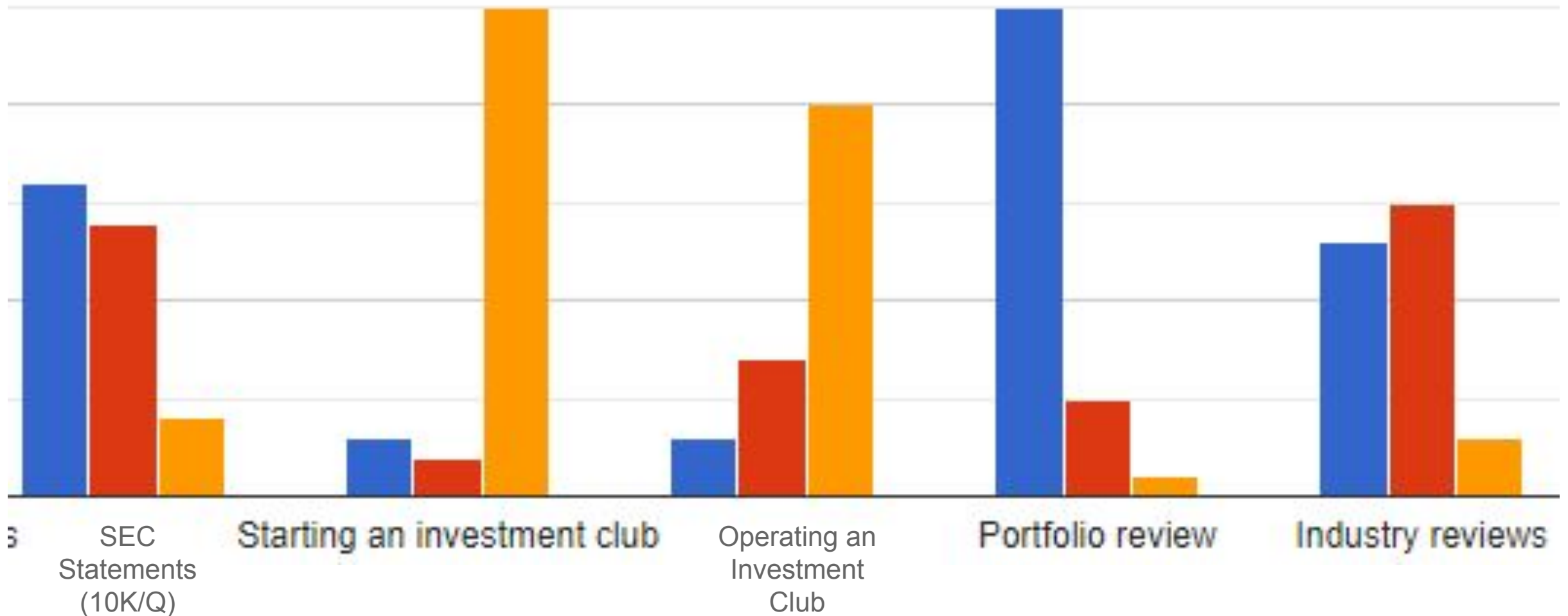
Raise hand or put in question box

**We answer**

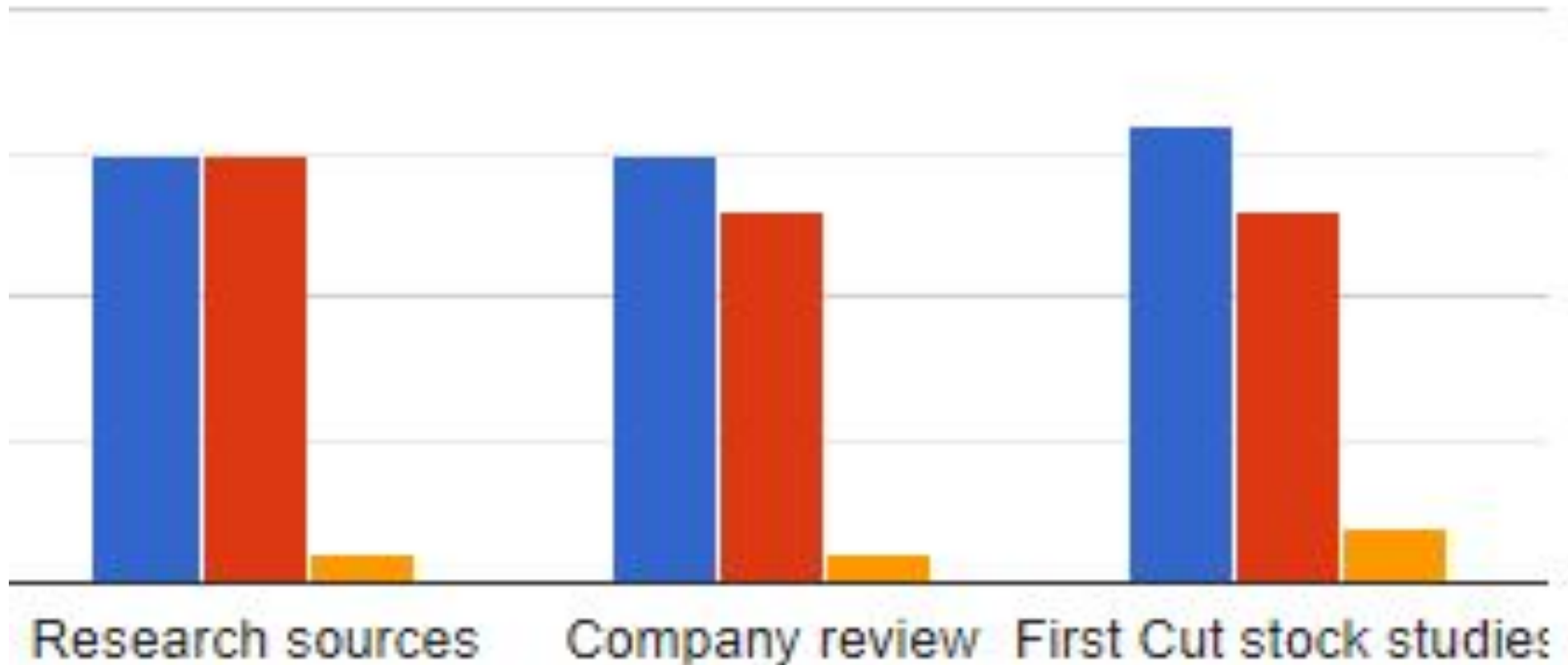
## Are you interested in finding out more about these topics?



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# Survey Comments

- How to reevaluate a stock that I've bought when it's share price & P/E ratio drops dramatically
- I have a math phobia; It's serious. When equation 'speak' begins, my brain automatically shuts down. Would love to have basic terms described in simple everyday language.
- How do all the ssg plus entries interrelate?
- How can I find out what others are doing in research companies?
- How to manage my investment portfolio of mutual funds and some stocks



# Survey Comments (continued)

- I've never been quite clear on the last section of the SSG where one calculates the 3 zones. Would like a review of that.
- REITS
- I think it would be valuable if the chapter had a portfolio contest like some other chapters.
- Valuation analysis for small companies which may or may not have profitability
- Best way to access Value Line
- We need ways for clubs in the same area to communicate with each other and share ideas, help each other on treasurer's stuff, things like that

# Survey Comments (continued)

- When to sell
- What's a First Cut?
- How to bench mark your portfolio against different indexes. Having difficulty with making sense of 10 k,10q and financial analysis. Thank you
- I want a portfolio contest that means something (not the \$ reward) but the learning experience.
- Figuring out how to estimate sales. How to find companies
- How about a portfolio contest like other chapters have?
- Let's hold some workshops where we can talk back

# Survey Comments (continued)

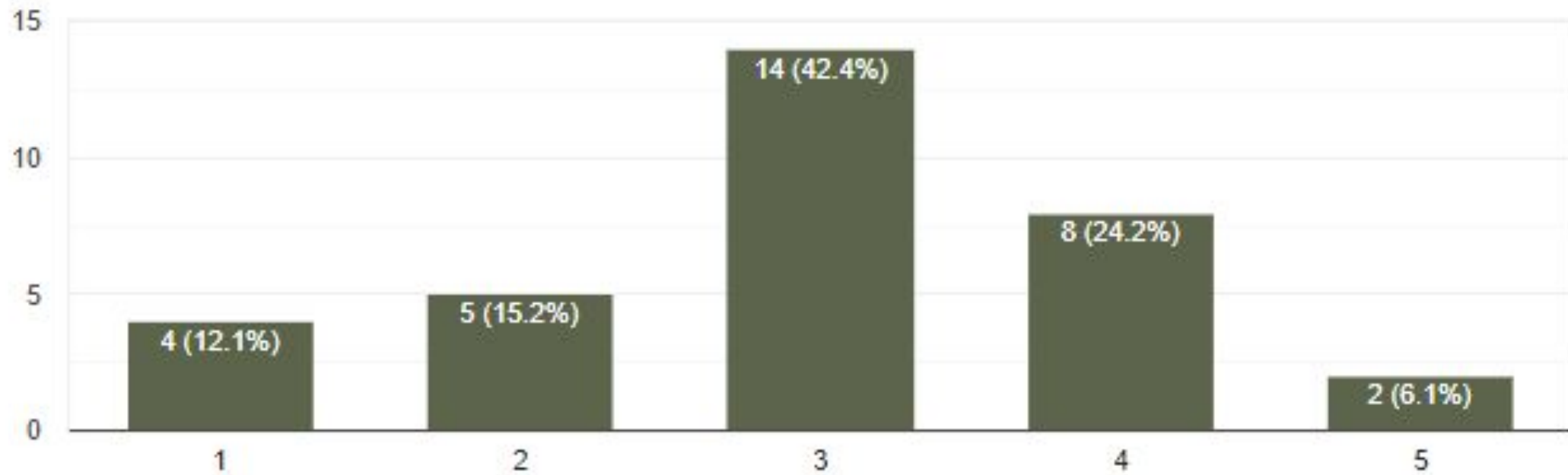
- Mentoring on SSGs - personal help
- First Cut Stock Study on ONE company
- How to present milestone certificates to clubs
- I am spending way too much time on investing and stock studies. Really do not want to do any more than I am currently doing. In fact, I want to back off from time spent in this area.
- Can we be thinking about some kind of SSG contest?
- I would like to know more about "accelerating" one's investment growth
- ??



# Self Rating as Stock Investor

How would you rate yourself as a stock investor?

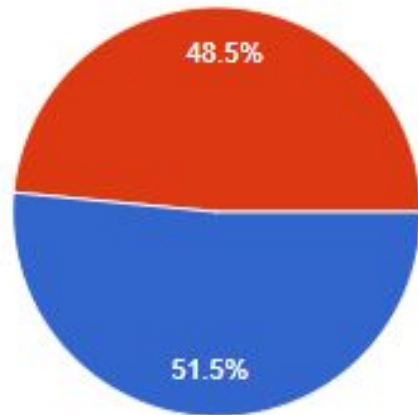
33 responses



# Club Status

Are you currently a member of an Investment Club?

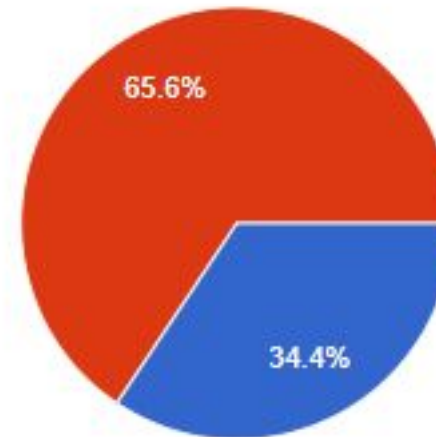
33 responses



● Yes  
● No

Are you searching for a club to join?

32 responses

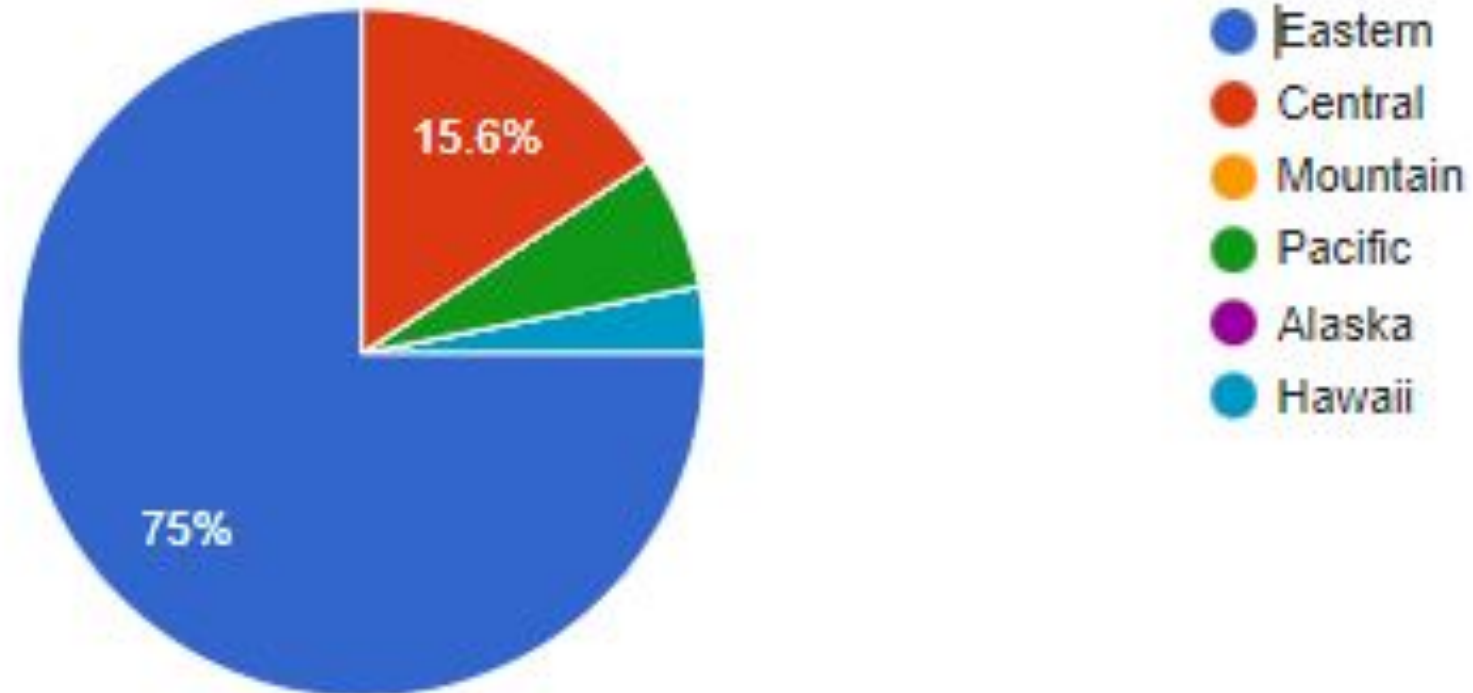


● Yes  
● No

# Time Zone

What time zone are you in?

32 responses



# Questions?

*Chris McCarron*

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[www.BetterInvesting.org/Contact-us](http://www.BetterInvesting.org/Contact-us)