



Club Visit Request Form

Date: _____

Club Name: _____

Number of Members: _____ BetterInvesting Club Number: _____

How many members belong to BetterInvesting? _____

Month and Year Organized: _____ Use Club Accounting? Yes _____ No _____

Club Contact: _____

Phone: _____ Email: _____

Mailing Address: _____ City: _____ Zip Code: _____

Topics of Interest: _____

Examples of Topics: How to form an investment club; general guidance for new clubs; resources from BetterInvesting for your local chapter; bookkeeping and accounting for adding a new member; partial or full withdrawals; when a member dies etc. Every new or existing BetterInvesting club is entitled to one free hour-long visit per calendar year.

Visit Request Date and Time: _____

Location: _____

If your club would like training on any of the following: Stock Selection Guide (SSG), Stock Comparisons, Portfolio Management, Online Accounting, SSG Core or SSG Plus online, refer to the following guidelines:

For a personalized club visit with purpose to teach a class or concept, a per attendee fee is required. Classes are not less than two hours, for a fee of \$5.00 per hour per person, and a minimum total of \$50.00. For example, a club consisting of ten people would pay \$100 for a two-hour class. The money is payable to the Channel Islands Chapter.

Yes, our club would like a class on _____

We understand the above guidelines. Presiding Member signature _____

Applications for club visits are required at least 30 days in advance. Send to: Registrar, Channel Islands Chapter, BetterInvesting, P.O. Box 3418, Camarillo, CA 93011-3418. Questions? Call (805)-987-2000.