

June 19, 2021

# WELCOME!

Annual Meeting  
Golden West Chapter

Linda Robins  
President



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## Agenda

- ❖ Welcome and Introduction
- ❖ Anniversary Club Celebration
- ❖ Overview of Chapter and Plans for the Coming Year
- ❖ Election of Directors
- ❖ Educational Presentations
- ❖ Club Portfolio Contest Results
- ❖ Volunteer Recognition
- ❖ Closing Remarks

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## Prize Drawings

- ★ SSG Plus membership or upgrade (\$120) (x2)
- ★ Online Subscription to Investor Advisor Services (\$299 value)
- ★ Online Subscription to SmallCap Informer Newsletter (\$200 value)

### *Completed Survey Drawing*

- ★ SSG Plus membership or upgrade (\$120)
- ★ Online subscription to MyStockProspector.com (\$60)

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Happy Anniversary to  
Our Clubs!



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## Celebrating

### 5 Years

Ujaama Investment Club  
SoCal Model Stock Investment Club  
Upn Comers Inv Club

### 15 Years

Cutting Edge Inv Club  
Our Future Investments

### 20 Years

Feast Investment Club  
Sense and Sensibility  
Tyme Investment Club  
Women With Funds

## Celebrating

### 25 Years

Fast Forward Investment Club  
Frontline Investment Club  
Gold Coast Investments  
Many Happy Returns Investment Club  
Power Pickers Investment Club  
S Cubed Investment Club  
South Bay High Rollers

### 30 Years

Granada Investment Club  
Inv Engineering Club

## Ujamaa Investment Club

- 5 years together
- Looking to meet a shared need
- Technology helps to remain connected
- Operating Procedures in place
- They challenge themselves to put what they learn to work in personal portfolios



## Granada Investment Club

- 30 years investing
- Encouraged to begin by the older generating
- A core group keeps things going strong
- Their guiding principle - learn how to invest
- The club continues to be rewarding for everyone involved
- Next challenge....get their kids involved in investing!

# Congratulations!

## Volunteer Recognition



Linda Robins 5 years



Jayne Don Vito 5 years



Virginia Cooper 25 years

## BetterInvesting

Non-Profit  
Volunteer Based  
Member Driven

### 4 Main Principles:

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

## Golden West Chapter

The BI Golden West Chapter (BIGW) 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

## Treasurer's Report

- We ended last fiscal year (Sept. 30, 2020) with a net operating income of \$-1944.08.
- YTD our financial results reflect a net operating income of \$-186.14
- We maintain a healthy cash position, but we continue to look for opportunities to generate income.
- Our goal is to at least break even on all our classes and events and be able to cover the administrative expenses of the chapter.

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## Planned 2021 Chapter Events Monthly

Orange County Model Stock Investment Club  
1st Saturday Online  
9:00 am -11:15 am

So Cal Model Stock Investment Club  
2nd Saturday Online  
10:30 am -12:30 pm

First Friday "Happy Hour"  
1st Friday Online  
5:30 pm - 6:30 pm

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## Planned 2021 Chapter Events

### Mark Your Calendars

June 29 - Webinar  
*Different Strokes for Different Folks Panel Discussion*

August 31st - Webinar  
*The First Cut is the Deepest*

September 30th - Webinar  
*What's Wrong with This Picture?*

October 21-24 - BetterInvesting National Convention  
Dallas, Tx

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## Planned 2021 Chapter Events

Information and registration for all of these events can be found in Local Events on the Chapter website at [www.betterinvesting.org/chapters/goldenwest](http://www.betterinvesting.org/chapters/goldenwest)

To make sure you don't miss out on these, or any other 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.

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# Directors and Volunteers

## Directors

Belinda Adams - Treasurer  
Linda Brown  
Virginia Cooper - Secretary  
Marcia Couey  
Dale Davis - VP Education  
Dori Raser - VP Marketing  
Richard Raser  
Linda Robins - President  
Margot Taub  
Carol Weepie - VP Membership  
Anita Widmayer - Assistant Treasurer

## Volunteers

Jayne DonVito - Webmaster  
Frank Paiano

# Directors up for Election

Belinda Adams  
Linda Robins

# Directors Elected

Belinda Adams  
Linda Robins



# THANKS!

Any questions?

Email: [contact@goldenwest.betterinvesting.net](mailto:contact@goldenwest.betterinvesting.net)

Website: [betterinvesting.org/chapters/goldenwest](http://betterinvesting.org/chapters/goldenwest)

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# Prize Drawing

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**This session is being recorded for future use.**

# Educational Presentations

## Club Portfolio Contest

- 9 clubs participating
- 56 unique stocks followed

## Club Portfolio Contest Results

- 8 clubs participating
- 43 unique stocks followed

*AND THE WINNERS ARE . . .*

## Club Portfolio Contest Results

### *FIRST PLACE*

SoCal Model Stock Investment Club

### *SECOND PLACE*

Gelt Gals

### *THIRD PLACE*

Fast Forward Investment Club

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# Prize Drawing

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## Closing Remarks

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**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



We currently need people who are interested and/or have expertise in:

- Board Membership to help grow our programs
- 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 enjoy each other's company at our meetings. Our board meetings are held online on the second Thursday each month.

[contact@goldenwest.betterinvesting.net](mailto:contact@goldenwest.betterinvesting.net)

## 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](http://BetterInvesting.org/InvestBetter)

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**THANK YOU!**

Have a wonderful afternoon!

Email: [contact@goldenwest.betterinvesting.net](mailto:contact@goldenwest.betterinvesting.net)  
Website: [betterinvesting.org/chapters/goldenwest](http://betterinvesting.org/chapters/goldenwest)

