

**CHICAGOLAND CHAPTER NEWSLETTER**  
*Serving Chicago and North/South/West Suburban Counties & Beyond*  
*Your Half-yearly Update***PRESIDENT'S MESSAGE**

*Happy 2025 to all of you from your new president of the Chicagoland Chapter and as always we hope to do great things with your community. As we are already into the final stretch of February, it is a good time to do a raincheck and tweak your “new year resolutions”.*

*Last year the S&P 500 reached its second straight year of 20% gains, which is very rare and last happened in the 1990s. With a new US President taking office, and new policies outlined everyday! We need to look at our investment club (as well as personal) portfolios.*

*Last year we hosted the BINC in Chicago, however this year BINC will be a Virtual event on June 7 and June 14. Please save the date and inform all your club members as these are Saturdays.*

*I have been with this organization as a director for 7 years. I have been involved with educating, guiding, and helping people navigate the challenges of attaining financial freedom.*

*Please feel free to reach out to us for any help or guidance in education. We look forward to seeing everyone, either online or hopefully in person in the future.*

*Interested in joining us? We are always looking for volunteers. If you have any ideas, please share, by emailing at [contact@chicagoland.betterinvesting.net](mailto:contact@chicagoland.betterinvesting.net)*

As a final note below is a quote for the current times.

"If there is one common theme to the vast range of the world's financial crises, it is that excessive debt accumulation, whether by the government, banks, corporations, or consumers, often poses greater systemic risks than it seems during a boom." — Carmen Reinhart

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### **Recent Club Visits:**

Here are some recent club visits conducted over the last few months:

- The **Concord Group**, a 30+ year investment club, needed a tutorial on how best to provide a withdrawing club member with a stock payout. **Director Ray Giese** covered the procedures and protocols when transferring stock to a withdrawing member, as well as how the withdrawal affects the club members overall.
- In January 2025, **Director Paul Rom** conducted a club visit for the **Bronzeville Investment Club** during the club's annual meeting. The virtual club visit concentrated on how to use the BetterInvesting PERT reports and how they can enhance the club's awareness of changes occurring in their portfolio.
- Another important club visit was provided to the **Power of Women Inc Club** by **Director Wilma Rice** in January. This newly formed club wanted to better understand how the BetterInvesting tools and other benefits can help them run a more effective club meeting.

As a BetterInvesting investment club, you are *entitled to have a club visit by a Chicagoland chapter director*.

Club visits may be conducted either in-person or online and can cover a variety of investment topics. For example, your club may wish to better understand the stock study guide or have your club portfolio reviewed. New clubs and established clubs can all benefit from a club visit.

These are just some of the ways the Chicagoland chapter can assist your club. Interested in a club visit for your investment club? Contact us for more information at [contact@betterinvesting.chicagoland.net](mailto:contact@betterinvesting.chicagoland.net) to for more information.

### **Stock Discussion Group (SDG) Meetings:**

The next SDG meeting is scheduled for March 15th 2025. This will be led jointly by Director Paul Rom and Director Doug Kurtz. Both of them have been with this organization for a few decades now.

SDG meetings are listed on the Chicagoland chapter website. The link to local events is [Chicagoland Chapter Events](#).

A "stock discussion group" refers to a gathering of individuals, typically part of a local BetterInvesting investment club, where they come together to discuss and analyze stocks, share investment ideas, and review potential portfolio changes, often using the BetterInvesting methodology for stock selection and evaluation; essentially, it's a forum for members to openly talk about their stock picks and investment strategies within the BetterInvesting framework

How many millionaires do you know who have become wealthy by investing in savings accounts? I rest my case." — Robert G. Allen

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***Upcoming BINC Event:***

BetterInvesting National Convention (BINC) 2025 - This year's event will be held virtually on June 7 & June 14. Offers accessibility for attendees worldwide. For details on Corporate Presentation slots and pricing, contact Brenda Gayle (brendag@betterinvesting.org) from the Corporate Relations Department.

***Community Engagement:***

Financial Workshop for Seniors. In the past the Chicagoland chapter President Akari Muhsani led a well-received workshop on senior finances. He is invited back on February 24, 2025, from 12:00-1:00 PM. Sheryl Carter (past president of Chicagoland chapter and current director) will assist.

Sponsored by the City of Chicago Department of Family and Social Services at the Cultural Center (77 E. Randolph). Attendees include members from the Renaissance Court Regional Senior Center (55+ community).

# Ballin' on a Budget

Financial Literacy Class  
**Presented by Akari Muhsani**

Financial literacy class geared toward seniors to learn tools for wealth building and preservation.  
Free to all seniors 55+ years old.



**Monday,  
February 24,  
2025**  
**12:00-1:00**

Renaissance Court  
Regional Senior Center  
(312) 744-4550

*Accessible entrance at 77 E Randolph St*

