

BetterInvesting.

## *Online Chapter Monthly Bulletin*

**April 1, 2022**

**Volume 1, Issue 3**

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## **President's Message**

This month we're proud to present you with our third issue! From your comments, this bulletin format appears to be a handy way to share timely information with you. We want to continually improve how we can support you, so please continue to provide us your feedback at [OLC Monthly Bulletin Editor](#). This month, we've moved the recurring notices to a special section at the end of the bulletin so you know where to find the links you need, when you need them, without having to search through the Bulletin.

In this edition, we have more information on our Annual Membership Meeting this summer and new information on a special opportunity being offered to each member and club.

Our chapter's *pilot* portfolio contest is in its second month. We are looking forward to getting your ideas on how we can structure the contest to provide real examples of applying BI principles to stock selection and portfolio design. You can find more information in Dan's article.

We also have a summary of last month's Mentoring Workshop. This bi-monthly event (on the odd numbered ones) is presented by our Education & Training Committee under the leadership of Chris. The feedback so far is very supportive and, as one attendee put it, fills a much needed niche in our member training program that allows sharing of ideas in an open, two-way conversation that you just can't get from normal webinars. With your support, we will continue with more such programs in the future.

There are many more interesting and informative articles in this edition. Please, let us know what you would like to see by emailing us at [OLC Monthly Bulletin Editor](#).

Bob Houle, [OLC President](#)

## OLC Annual Membership Meeting: August 25, 2022

The Board of Directors of the OLC is excited to announce the Third Annual Membership Meeting on August 25, 2022 from 8:00 PM to 9:00 PM EDT. All BetterInvesting members in the Online Chapter, their guests, and others throughout the BetterInvesting universe are all warmly welcomed to attend this session. Here is the [registration link](#) to reserve your seat at the Annual Membership Meeting.

This year, we are proud to feature Scott D. Horsburgh, CFA as our keynote speaker. Scott is president of Provident Investment Management and a well known speaker and BetterInvesting educator. You may know him from past BINC *Live Repair Shop* sessions (a formal portfolio review conducted by Scott selected from club portfolio's submitted for this live review).

For a limited time, Scott has opened the window for accepting portfolios to be considered for review at the 70th BetterInvesting National Convention. Please consider nominating your club for this fantastic opportunity to have a certified financial analyst evaluate your stock portfolio. Scott tells us it is not just for clubs too; individuals may submit their portfolio for review. To have your portfolio considered, please submit the portfolio to [ScottH@investprovident.com](mailto:ScottH@investprovident.com).

Most of the program will be reserved for our guest speaker, but we will also be conducting a short OLC business session summarizing the achievements of this year and our plans for the upcoming year. We will also introduce a slate of Directors and the Executive Officers to be voted in for next year. We will be celebrating our Anniversary Clubs and sharing other information of interest to all our members.

Mark your calendars and be ready to enjoy this special night of celebration and education.

Bob Houle, [OLC President](#)

## OLC Pilot Portfolio Contest 2022

The combined value of the eight portfolios we are tracking changed very little in March, up less than \$300 or .3 of a percent. Similarly, the order from highest to lowest stayed relatively the same.

Portfolio Contest Standing as of March 31, 2022

Club	Starting Value	Portfolio Value 2/28/2022	Portfolio Value 3/31/2022
Let It Ride Investors of Cars	\$10,000.00	\$9,989.74	\$10,268.09
Investors R Us	\$10,000.00	\$9,855.21	\$9,942.39
Yankee Model Investment Club	\$10,000.00	\$10,100.60	\$9,734.44
Jack Long*	\$10,000.00	\$9,788.58	\$9,705.42
PYMWYMI Investment Club	\$10,000.00	\$9,592.83	\$9,644.67
Massaco Investment Club	\$10,000.00	\$9,719.32	\$9,624.33
OLC Director*	\$10,000.00	\$8,911.87	\$9,068.47
Emanon Investment Club	\$10,000.00	\$8,402.75	\$8,626.91
<b>Total</b>	<b>\$80,000.00</b>	<b>\$76,360.90</b>	<b>\$76,614.72</b>

\* Portfolio submitted but not eligible, will only be tracked

The entrants, their portfolios, and their standings can be viewed by clicking on [Club Summary](#) and [Club Details](#). Email questions or suggestions to [contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net) with "Portfolio Contest" in the subject line.

Dan Perlman, [Portfolio Contest Chair](#)

## OLC Mentoring Workshop: March Program Summary

The Online Chapter of BetterInvesting conducted a mentoring workshop for all our investment clubs and individual members on Wednesday, March 16<sup>th</sup> at 8:30 p.m.

The interactive workshop opened with a presentation about **Finding New Stocks**. This was very well received by experienced and new members alike, who struggle with finding new stocks to balance their portfolios. After the short presentation, the floor was open for attendees to pose questions on any topic related to stock investing or investment clubs. Several questions were submitted through the online survey and there were several live questions from the audience.

The education committee and the OLC leadership appreciates the overwhelming support to these sessions and we continue to enrich all from these great experiences.

Here is the [link](#) to a recording of the March Mentoring Workshop. Listen, enjoy and share as you please.

The next two sessions are on May 18, 2022 and July 20, 2022, starting at 8:30 pm ET. To join us, just click on this [Zoom](#) link. Details can be found on the [chapter's webpage](#).

The topic for the May 18th meeting will feature special guest, Bob Adams. Bob will present **Basic Rules—Investing for a Lifetime**. After Bob speaks, we'll open the floor for your questions and comments - on Bob's presentation or on any stock-related topic. Bob is retired from 26 years in radio & television broadcasting, and 13 years as a college professor. If you've never heard him speak, you're in for a treat!

Please join us so that we all can benefit from the shared wisdom and experience of the BetterInvestors™ members in the audience and the volunteers from the chapter.

Chris McCarron, [Membership Training & Education Chair](#)

## Club Support Update: Club Visits

There are almost 400 stock investment clubs in the Online Chapter and they all have the same goal of recruiting new partners to grow the clubs. BI experience shows that when a club does not grow by adding new enthusiastic members who can contribute to the success of the club, there is a good chance the club will become stagnant and eventually may even perish. So we would like to help your club by offering club support visits, virtually or in person (especially those clubs which meet in public places) to bring the strength of the OLC to support your club in any way possible to grow and flourish.

We hope your club partners will be prepared to hear from the experienced OLC volunteers to answer your questions and willing to share your experiences with those who are just beginning the journey to become better investors.

For more details or information or questions, email: Howard Johnson  
[club\\_support@online.betterinvesting.net](mailto:club_support@online.betterinvesting.net)

## BINC Registration

BINC is back and we're looking forward to you joining us in Dallas for our 70<sup>th</sup> birthday. The convention runs from the 23<sup>rd</sup> through the 26<sup>th</sup> of June. After a two year hiatus we are all ready to get together again and take that next step up in our investor education.

Don't miss out on the party. Register today at a reduced cost by going to [www.betterinvesting.org/binc](http://www.betterinvesting.org/binc).

## Online Chapter Satellites

The Online Chapter Welcomes our newest Satellite - South Central Texas.

The Online Chapter Local Volunteers would like to present in person Anniversary Certificates for Clubs celebrating milestone anniversaries. Look out for an invitation email. Your club may also reach out directly to inquire.

A club recently asked which Satellite they belonged to in order to schedule a club support visit. Knowing which, if any, Satellite a member lives in is not needed to get the support desired. All BI members and clubs in the chapter are supported by the Online Chapter.

Some members, those in a Satellite, have a group of dedicated and trained LOCAL volunteers to conduct club support visits and education events for the members in their area. Where volunteers live defines the Satellite's boundaries. The current Satellites are Long Island, New York City, Rochester, Yankee (RI and part of CT and MA) and South Central Texas. Next month, we will publish a map of the current Satellite locations and their support area. Requests for any form of support from the Online Chapter should be sent to [contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net). The team that monitors this email will sort out who on the chapter staff or in a local Satellite should respond to your request.

For more information [click here](#).

Susanne Koster, [Secretary and Satellite Coordinator](#)

## Club Milestone Anniversaries

The highlight of each year's chapter support for our stock investing clubs is the opportunity to showcase those clubs celebrating their 5 year anniversaries. In our chapter this year we will be recognizing 78 clubs with club anniversaries ranging from 65 to 10 years of continuous service.

Volunteers from the Online Chapter will be in touch with the club's contact person to set up a time (most likely online with COVID) for a formal Anniversary Certificate presentation along with a special training opportunity, tailored for each club's needs. Details will be provided as we contact each club. If you haven't been contacted yet, let Howard Johnson know by sending emailing him at [club\\_support@online.betterinvesting.net](mailto:club_support@online.betterinvesting.net)

## Recurring "Quick Access Links"

**BetterInvesting™ National News**

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BI emails all members a bulletin listing national webinar registrations, StockUps, TickerTalks, First Cut Stock Reports and more. You don't want to miss it!

If you are not receiving your *BI Weekly*, go to your [BI member profile](#) and update your *Email and Product Subscription Information* selections to let BI you would like to routinely receive.

## **BetterInvesting™ National Convention**

BINC is back and we're looking forward to you joining us in Dallas for our 70<sup>th</sup> birthday. The convention runs from the 23<sup>rd</sup> through the 26<sup>th</sup> of June. After a two year hiatus we are all ready to get together again and take that next step up in our investor education. Don't miss out on the party. Register today at a reduced cost by going to [www.betterinvesting.org/binc](http://www.betterinvesting.org/binc).

## **BetterInvesting™ Model Stock Investment Clubs**

BetterInvesting™ currently has 46 model clubs throughout the United States that you may want to visit. To help you find them, we have curated a list of active model clubs in all the BetterInvesting™ chapters that you may be interested in visiting. To find out when and where, click on this [curated list](#). Please report corrections to the [OLC President](#) and let us know how this directory can be made more useful for you.

## **How to Schedule a Club Support Visit**

If your club is not celebrating a five-year Anniversary this year, don't despair. We have reserved some calendar time for your club to receive a support visit from one of our club support *tiger teams*. With almost 400 stock investment clubs in the Online Chapter we can't, of course, visit all of our clubs each year. But we can support you, particularly if you have some training needs you need help with. If your club would like to benefit from one of the remaining eight open club visit time slots, all you have to do is let us know. For more details or information or questions please email us at [club\\_support@online.betterinvesting.net](mailto:club_support@online.betterinvesting.net)

**April 1, 2022**

**Editor: Sriram Madabhushi**

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