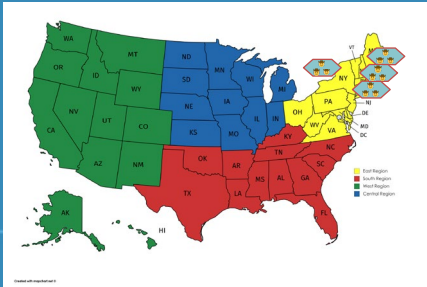


OLC Presents BI Educational Resources



**Dan Perlman, Chris McCarron,
Phil Sudore, Sriram Madabhushi**

September 15, 2021



DISCLAIMER

The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced. Investors should conduct their own review and analysis of any company of interest before making an investment decision.

Securities discussed may be held by the instructors in their own personal portfolios or in those of their clients. BI presenters and volunteers are held to a strict code of conduct that precludes benefitting from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO or Volunteer Relations.

Agenda

**OLCEC – How does it serve you
Where do I begin?**

Where can I find resources?

**The SSG: What does it do? What information
can it provide?**

What are some of the Other resources?

Closing

OLCEC



Chris McCarron

contact@online.betterinvesting.net

We Aim to Please

- **OLC EC needs your help to channel its energy!**
 - **What investment questions or challenges would you like addressed? Put them in the question box!**
 - **What one piece of knowledge are you or your club missing that would really make your life easier? Put it in the ? box!**
- **Email your questions to us!**
Contact@online.betterinvesting.net

New Investor Track – Where to Start?

- I'm a new investor, where do I begin?
 - How about this: [Understanding the jargon](#)
- What is BetterInvesting and what can it do for you?
 - This [video](#) may help!
- What's the BetterInvesting philosophy that you keep hearing about?
 - It is explained [here](#).

New to BI – Where to Start?

- You may want a [course](#) to help you understand BI's online stock selection guide.
- Want to [join](#) or [start](#) an investment club?
- Do you have a new [treasurer](#)?
- There are also a [wealth of resources](#) for more experienced investors.
- Lesser-known resources – like [chapter recordings](#), Chapter FaceBook pages, [BI Youtube](#) & [BI Wiki](#)

Chapter Resources

➤ How to access chapter resources?

The screenshot shows the BetterInvesting website's navigation bar and main content area. The navigation bar includes links for Tools, Store, Help Center, and a user profile for Chris McCarron. The main navigation menu includes Home, Welcome to BetterInvesting, Learning Center, Find Great Stocks, Online Tools, Investment Clubs, and Our Community. The Our Community menu is expanded, showing options like Get Started, Chapter Basics, My Chapter, Other Chapters, Member Stories, How to Volunteer, Education Partne, and Corporate Parti. The main content area features a section titled 'Complete List of BetterInvesting Chapters' with a button for 'LOCAL CHAPTERS BY STATE'. Below this is a 'Web Only Chapter' section with an 'Online Chapter' link and a description: 'All members residing in areas outside of the local chapters listed below belong to the Online Chapter.' At the bottom, there is a 'Local Chapters by State' section with a list of letters: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z.

Tools | Store | Help Center | Welcome, CHRIS MCCARRON | MY ACCOUNT

BETTERINVESTING™ HOME WELCOME TO BETTERINVESTING LEARNING CENTER FIND GREAT STOCKS ONLINE TOOLS INVESTMENT CLUBS OUR COMMUNITY

Complete List of BetterInvesting Chapters

LOCAL CHAPTERS BY STATE

Web Only Chapter

Online
[Online Chapter](#)
All members residing in areas outside of the local chapters listed below belong to the Online Chapter.

Local Chapters by State

BetterInvesting chapters are located across the country.
Select the first letter of the state name that you are interested in locating a chapter.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

From Other Clubs...



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CENTER ▾

FIND GREAT
STOCKS ▾

ONLINE
TOOLS ▾

INVESTMENT
CLUBS ▾

OUR
COMMUNITY



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Email



Chapter Suggestions

- **OnLine Chapter**
- **California- Silicon Valley**
- **Florida - North Florida**
- **Oklahoma, Kentucky & Indiana - OKI Tri-state**
- **Pennsylvania – Pittsburgh**
- **South Carolina Chapter**
- **Texas – West Texas**
- **Washington – Puget Sound**

Choose News & Articles



Online Chapter

Local Events

Contacts

Model Investment
Club

Visit-A-Club

Investment Club
Support

News & Articles

Volunteering



Who We Are and Where We Serve

The Online Chapter provides support for all BetterInvesting members who are not able to draw support from a traditional chapter nearby due to where they live. Our Chapter's membership and support team are drawn from various locations throughout the United States and overseas. We provide a full range of member services to over 3,300 BetterInvesting members and over 345 BetterInvesting stock investment clubs through use of cutting edge web conferencing technology. Our goal is to provide the highest level of service and support to our membership no matter where they live.



Mission & Goals

is a non-profit, investment education association helping individuals and become successful lifelong stock investors. Our Chapter's mission is to provide support for the education, training and mentoring of all our members so they may fully develop the investing skills needed to achieve their financial independence. It is the same mission as other Chapters with one major difference. The others have responsibility for providing training and education support to BetterInvesting members within a relatively convenient geographic area where there are clusters of BetterInvesting (BI) members grouped in areas where our Volunteers, similarly grouped, are able to provide direct, personalized support and services.



What You Will Find



[Recording](#)

[President's State of the Chapter Report](#) to the Membership

EDUCATION WEBINARS

Playing the Investment Piano with Both Hands - Part 3, December 15, 2020

Class Recording: [Click to view recording](#)

Class Handout: [Click to download slides](#)

Playing the Investment Piano with Both Hands - Part 2, November 17, 2020

Class Recording: [Click to view recording](#)

Class Handout: [Click to download slides](#)

[Online Chapter First Annual Meeting](#), July 30, 2020

Class Title: Playing the Investment Piano with Both Hands - Part 1 by Saul Seiberger

Class Recording: [Click to view recording](#)

Class Handout: [Click to download slides](#)

[Online Chapter Volunteer Orientation](#), March 5, 2019

Class Title: REITs by Saul Seiberger

Class Recording: [Click to view recording](#)

Class Handout: [Click to download slides](#)

And Another Thing...

 Tools |  Store |  Help Center

Welcome, CHRIS MCCARRON

MY ACCOUNT



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OUR
COMMUNITY



[Home](#) > Learn About Investing

Learn About Investing

"Why Should I Invest in Stocks?"

Investing in the stock market offers significant opportunities for potential education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs.

START YOUR 30-DAY FREE TRIAL

Learn How To Invest in Stocks

Dec 23, 2020

GET STARTED

YOUR PATH TO BETTER INVESTING

BETTERINVESTING MAGAZINE

VIDEO LEARNING LIBRARY

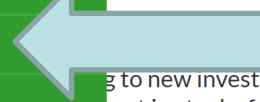
EVENTS

STOCKUP

TICKERTALK

INVESTOR EDUCATION ARTICLES

WORKSHEETS






ing to new investors. BetterInvesting provides investment education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs. BetterInvesting provides investment education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs. BetterInvesting provides investment education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs. BetterInvesting provides investment education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs. BetterInvesting provides investment education based on our time-tested principles of fundamental stock investing no matter the short term ups and downs.

Email



Party with the Neighbors

 Tools |  Store |  Help Center

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Events



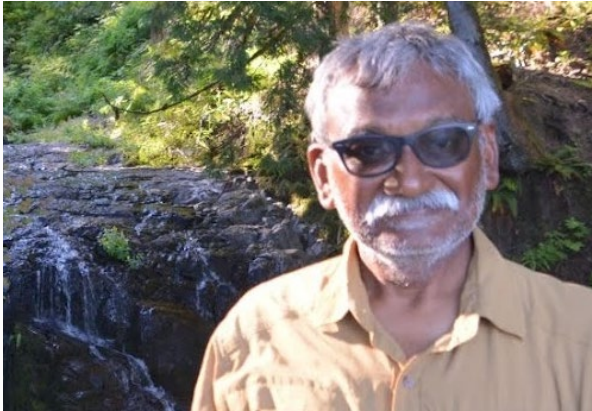
Date	Event	Location
10/21/2021 - 10/24/2021	BetterInvesting National Convention BINC 2021	The Westin Dallas Park Central
9/8/2021 6:30 pm - 8:00 pm CT	South Texas Model Stock Investing Club - September	Online event
9/11/2021 11:00 am - 12:30 pm ET	Yankee Model Stock Investing Club - September	Online event
9/20/2021 8:30 pm - 10:30 pm ET	International Model Stock Investing Club-September	Online Event
10/9/2021 11:00 am - 12:30 pm ET	Yankee Model Stock Investing Club - October	Online event

Email

Chapters with Facebook Pages

- **OnLine**
- **South Florida**
- **Georgia**
- **Inland Empire**
- **Puget Sound**
- **North Texas**
- **New Jersey**
- **Portland**

Resources



Sriram Madabhushi
contact@online.betterinvesting.net

Where Can I Find Resources?

- Investment education resources are everywhere:
 - BI – website, conferences, chapter meetings
 - Online, webinars, talks and presentations
 - In your club, chapter and satellites
 - Outside the BI
 - As a BI member, first place to start is the website:
 - First Cut
 - StockUp
 - TickerTalk
 - Guest Speaker Series



Primary Resources

More BetterInvesting Resources

- **BI Magazine** – search and find historical information and articles; find gems and revisit ageless articles of importance
- **Investor Education Articles:** contain a ton of information and are a great research source
- **Worksheets** – check list, SSG and report, stock comparison guide, quality worksheet, SSG guidelines for beginners, PERT-A, -B, research
- **Volunteer resources** – chapters

Secondary Resources

How to Put the Resources to Use?

- **Your Path to Better Investing: Why Invest? How? Online Tools, SSG**
- **Video Learning Library: Intro to SSG; Adding Judgement; Buy the Best: Special programs. Skill-level. Searchable and sortable.**
- **Presentations and Training Sessions: Use them to present to your club, new members, or to periodically revisit to better your skills**



Better Investing Videos and Magazine

- **Online Demo**

Search and Sort by:

Program

Clear

- Intro to the SSG
- Adding Judgment
- Buy the Best
- Special Programs
- StockUp
- TickerTalk
- Online Tools
- Investment Clubs
- Membership
- Guest Speaker Series

Access Level

Clear

- All Members
- Core & Plus Members
- Plus Members Only

Skill Level

Clear

- Novice
- Intermediate
- Experienced

Video Learning Library

The complete library of BetterInvesting's video-based content. Use the filters to narrow down the list.



Reflections of a Lifelong Better Investor

Class Title: Reflections of a Lifelong Better Investor
Program Title: StockUp
Release Date: 8/26/2021
Length: 1:17:39

Cy Lynch shares insights into how he applies BetterInvesting's principles and stock selection methodology to successfully manage his own stock portfolio.



TickerTalk July 2021

Class Title: TickerTalk July 2021
Program Title: TickerTalk
Release Date: 7/21/2021
Length: 1:11:48

Topics include: Improve Your Investing Skills; Adjusting Your SSG for Unusual Situations; Getting Started with the Online Portfolio Tools; Five in Five (stock ideas)



TickerTalk June 2021

Class Title: TickerTalk June 2021
Program Title: TickerTalk
Release Date: 6/24/2021
Length: 1:07:50

Topics include: First Cut Stock Reports Overview; Tips to Write a First Cut; Core vs. Non-Core Investments; Five in Five (stock ideas)

Topics

Clear

- Company Research and Data
- Education Resources
- Industry Studies
- Investing Basics
- Investment Club
- Online Tools
- Personal Finance
- Portfolio
- SSG - Basics
- SSG - Company Quality
- SSG - Forecasts
- SSG - Special Companies
- SSG - Valuation
- Stock Ideas
- Membership
- Additional Topics

Resources to Help You



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Online Tools

Learn about our online stock selection tools.

GET STARTED



ONLINE TOOLS



LEARNING
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MEMBER
BENEFITS

Most Active Stocks

The top 10 companies our members are investing in are:

1. Apple (AAPL)

Buy/Sell

104-86

GET STARTED

YOUR PATH TO BETTER INVESTING

BETTERINVESTING MAGAZINE

VIDEO LEARNING LIBRARY

EVENTS

STOCKUP

TICKERTALK

INVESTOR EDUCATION ARTICLES

WORKSHEETS

Every week, members from across the country share new stock studies.

VIEW ALL

Online Tools

GO - Enter Ticker Here

GO

My Studies

Try Our Stock Tools for Free

Reports



Better Investing Magazine



Stock Selection Guide: Education and Information

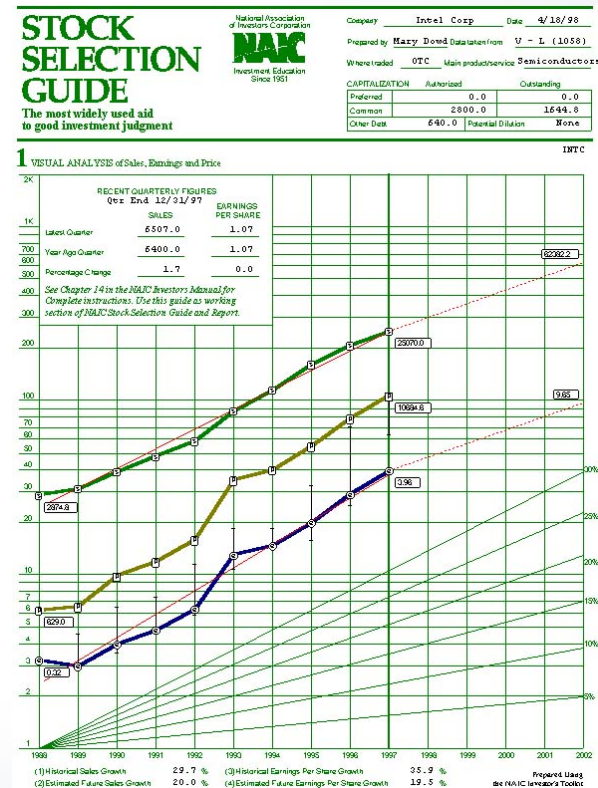


Dan Perlman

president@online.betterinvesting.net

Stock Selection Guide

- Three Versions
 - Core SSG
 - SSG Plus
 - Toolkit
- Key Functions
 - Stock Analysis
 - Stock Comparison Guide
 - PERT: Portfolio Analysis



The Heat Map

BetterInvesting Ticker Heat Map



The heat map is intended to be a resource for looking for stock ideas. The heat map shows the top 100 tickers that our members have created studies for in the past 90 days. The size of the boxes indicates the number of times a study has been created for a ticker relative to the other tickers. The larger the box as compared to the other boxes, the more studies that have been created. The color of the box indicates general favorability sentiment of the company. The color ranges from green to yellow to red. The more green the box, the more positive the favorability and the more red the box, the more negative the favorability. Note that the colors should not be used as buy/hold/sell indicators.



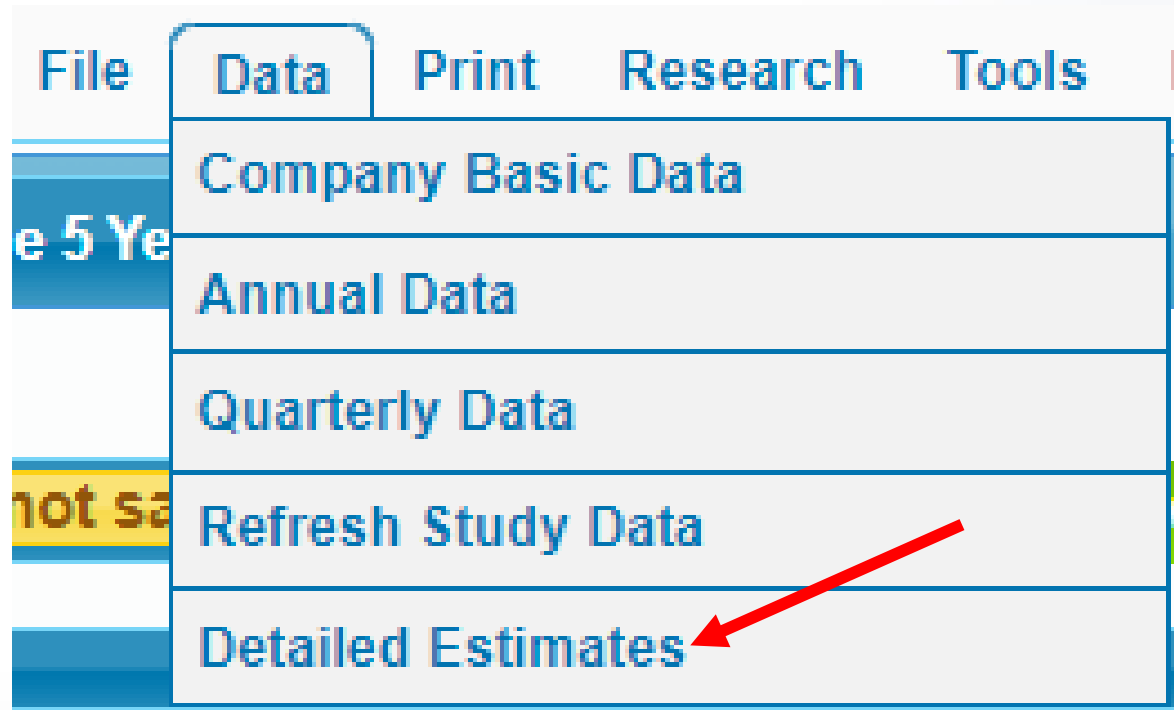
Click on a ticker to create a study.

SSG Core and Plus

- Provide Information about each company
 - Company Description
 - Past sales growth
 - Past EPS growth
 - Price per share
 - Analysts' estimates



Data Resources



Sales and EPS Estimates

Detailed Estimates

Update Detailed Estimates

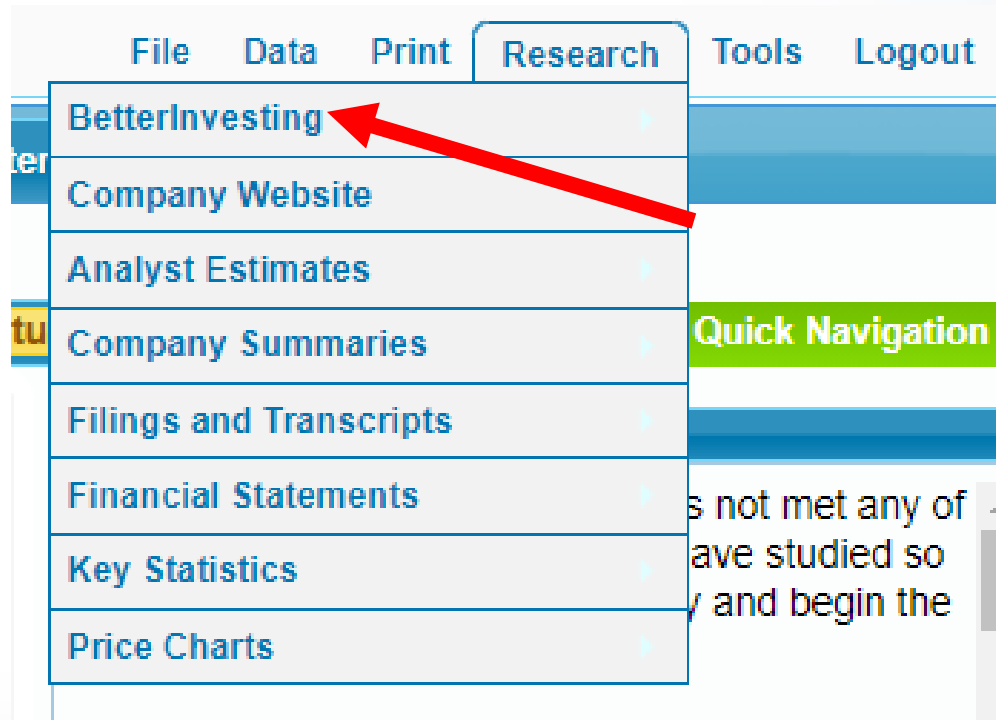
Fiscal Year	Sales Estimate (\$M)	Num of Sales Est	EPS Estimate (\$)	Num of EPS Est	Source	St	Lock
2021	<input type="text" value="283,244.4"/>	<input type="text" value="6"/>	<input type="text" value="17.78"/>	<input type="text" value="6"/>	Morningstar ACE <input type="button" value="v"/>	D	<input type="checkbox"/>
2022	<input type="text" value="306,369.8"/>	<input type="text" value="6"/>	<input type="text" value="20.34"/>	<input type="text" value="6"/>	Morningstar ACE <input type="button" value="v"/>	D	<input type="checkbox"/>
2023	<input type="text" value="327,275.3"/>	<input type="text" value="2"/>	<input type="text" value="23.12"/>	<input type="text" value="2"/>	Morningstar ACE <input type="button" value="v"/>	D	<input type="checkbox"/>
2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select... <input type="button" value="v"/>		<input type="checkbox"/>
2025	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select... <input type="button" value="v"/>		<input type="checkbox"/>
2 Year Sales Avg Est (%)		Num of Sales Est	Long-Term EPS Avg Est (%)	Num of EPS Est	Source	St	Lock
<input type="text" value="9.5"/>		<input type="text" value="6"/>	<input type="text" value="12.6"/>	<input type="text" value="2"/>	Morningstar ACE <input type="button" value="v"/>	D	<input type="checkbox"/>

Update Study

Status (St): 'D' = Default Data 'U' = User Modified Data

If the Lock checkbox is checked, then data in the row is not updated when the data is refreshed.

Research Information



Member Sentiment

The image shows a screenshot of the BetterInvesting website's navigation menu. The menu is organized into two columns under the 'Research' tab. The left column lists various research tools, and the right column lists specific research options. A red arrow points to the 'Member Sentiment' option in the right column.

File	Data	Print	Research	Tools	Logout
BetterInvesting				Company Research	
Company Website				BI Magazine	
Analyst Estimates				Member Sentiment	
Company Summaries				Search BI Website for Ticker	
Filings and Transcripts					
Financial Statements					
Key Statistics					
Price Charts					

Member Sentiment Data

▶ BetterInvesting Member Sentiment

Member Judgment Forecasts from Recent Studies (Total Completed Studies = 379 in past 90 days)

Sel <input type="checkbox"/>	Last Update	Sales (%)	EPS (%)	High PE	High EPS	High Price	Low PE	Low EPS	Low Price	Payout (%)	Pot. Return
<input type="checkbox"/>	08/10/21	6.6	10.4	22.00	24.83	546.25	14.00	15.14	212.00	29.4	7
<input type="checkbox"/>	08/10/21	8.5	10	22.00	24.38	536.43	14.50	16.03	250.00	29.4	6.8
<input type="checkbox"/>	08/10/21	8.6	8.3	26.00	22.56	586.46	16.00	10.72	226.00	26.9	8.4
<input type="checkbox"/>	08/10/21	9.5	12.6	22.40	27.40	613.85	15.40	14.29	260.00	28.8	9.4
<input type="checkbox"/>	08/10/21	7.5	10.4	22.40	25.15	563.40	14.50	15.14	219.50	29	7.8
<input type="checkbox"/>	08/10/21	6	10.9	17.70	28.32	501.19	14.00	18.47	213.00	28.2	5.7
<input type="checkbox"/>	08/10/21	8	10	22.00	24.38	536.43	15.00	15.14	227.10	29.4	6.8
<input type="checkbox"/>	08/10/21	9	13	26.00	29.53	767.89	18.00	14.33	255.00	28	14.4
<input type="checkbox"/>	08/10/21	9.3	12.8	22.40	32.12	719.55	15.40	14.29	240.00	28.8	13.1
<input type="checkbox"/>	08/10/21	8.3	12.1	21.00	26.80	562.82	14.90	12.19	208.50	28.8	7.9

Other Resources



Phil Sudore

contact@online.betterinvesting.net

Other Resources

Brokerages

Ameritrade invest.ameritrade.com



Etrade us.etrade.com



Fidelity www.fidelity.com



Investment research

- Value Line valueline.com
investment survey – large cap
expanded survey – small/mid cap



- Morningstar morningstar.com
mutual fund, stock research



Other Resources

- **I CLUB central** iclub.com
- **BetterInvesting's wholly-owned for profit organization**
- **Toolkit Application**
 - **Stock selection**
 - **Portfolio Management**
 - **Data Feed**
- **Monthly Newsletter – Stock Ideas with Judgements (subscription)**
 - **Investor advisory service for Large Cap Stocks**
 - **Small Cap Informer for Mid Cap/Small Cap Stocks**
- **myICLUB.com – treasurer accounting for clubs**



Other Resources

Stockcharts stockcharts.com



- Free option
- Daily / weekly charts
- Charts technical analysis momentum indicators
- Relative Strength Index (RSI)
- Moving Average Convergence Divergence (MACD)

- Three fee levels
- Ability to add technical indicators, overlays, saved charts,
- RT data, direct trading, larger charts
 - basic / 'casual'
 - extra / 'most popular'
 - pro / 'full-power'

Other Resources

➤ **Finviz**

finviz.com



➤ **Free**

➤ **Charting**

➤ **News**

➤ **Custom Stock Screener with optionality for:**

➤ **Descriptive**

➤ **Fundamental**

➤ **Technical**

➤ **Crypto Charts**

➤ **Back Tests (Subscription)**

Other Resources



- **Manifest Investing**
- **Free Trial**
- **Dashboards**
- **Stock Screenings**
- **Quality Indicator**
- **Webcasts**
 - **Expected return**
 - **Bull session**

Other Resources



- **Monthly investing Round Table Sessions**
 - **Free**
 - **Portfolio Management**
 - **Screening Techniques**
 - **Stock presentations with analysis by experienced investors**
 - **Participate in stock vote**
 - **Time for questions**
 - **Registration: manifestinvesting.com/events**

Questions?

contact@online.betterinvesting.net



Conclusion

- Download the handouts
- OLC EC needs your help to serve you better:
 - Let us know in which areas you want us to provide a more indepth information.
 - Answer the survey
 - Email us: contact@online.betterinvesting.net
- Thank you for attending!