



# BETTER INVESTING™

## South Florida Chapter



### *All On Board!!!*

*(Editor's Note: The South Florida Chapter has new officers commencing their positions October 1, 2024-September 30, 2025: President – Sofia Bitela, Vice President – Ionnie McNeill, and Secretary – Mark Klein.)*

**H**ello, and I'd like to welcome you as the President-Elect of the BetterInvesting (BI) South Florida Chapter! You may recognize me from the educational events and series we've hosted. I am excited about making the upcoming year another success for the chapter and its members. For a little about myself, I have experience in finance and pivoted towards a career in technology, where I still work. I leverage my professional experiences and learnings to help further refine my stock analysis skills, as well as provide mentorship and guidance for BetterInvesting members and nonmembers. In the meantime, please check our Local Events page (<https://www.betterinvesting.org/chapters/south-florida/local-events>) for upcoming sessions and meetings. Also, please be on the lookout in your inbox for surveys and communications regarding opportunities to further engage with the chapter and each other. We have some great ideas we aim to bring to fruition and would like you to be a part of it! We look forward to helping make the next year be the best yet for the South Florida Chapter community. **Sofia Bitela**, *President-Elect 2024-2025, Instructor*

# What's New?



**S**in stock or angel stock (ESG): it's your choice, just be INFORMED. The name of the game for the BetterInvesting member is personal investing in quality growth companies without paying an "arm and leg" for a stock position. When screening stocks, some investors may or may not consider ethics or morality, while other investors may seek companies with shared values to their own principles. Also, there's the investor whose interest is only in stock yield and increasing their stock position.

Investment education is foremost to becoming an intelligent investor with a profitable portfolio to prove your success. Therefore, the South Florida Chapter is covering all the bases in offering a series on Sin Stocks (see page 3). Plan to join the Deep Dive In Sin Stocks to be presented by newly elected chapter president, Sofia Bitela. Sofia is a financial professional who has presented for the Chapter, other chapters, and BetterInvesting.

**All Florida Investor Day** – A spring season event is being planned with the North Florida Chapter. Details are forthcoming.

**BINC 2025** – The BetterInvesting National Convention will be VIRTUAL. Stay tuned for details.

**BINC 2026** – Begin making plans now to attend the BetterInvesting National Convention in-person. The dates and city will likely be announced at the 2025 BINC.



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The BetterInvesting South Florida Chapter Newsletter is published a minimum of two times a year. The purpose as a nonprofit 501(C)(3) education group is to offer investment education to BI members and non-members, serving the Florida counties of: Broward, Charlotte, Collier, Lee, Martin, Miami-Dade, Monroe, Palm Beach, and St. Lucie.

<https://www.betterinvesting.org/chapters/south-florida>

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Ionnie McNeill, President and National Board Director / Barbara B. Cobb, Editor / Philip "Phil" Keating, CFA (Founding Director, 1987)

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# 2024-2025 SCHEDULE

Registration Required: <https://www.betterinvesting.org/chapters/south-florida/local-events>  
EVENTS ARE ONLINE AND FREE

## INVESTMENT EDUCATION

**Learn to Earn** - Participate in a guided completion of the Stock Selection Guide (SSG) using the monthly BetterInvesting magazine featured Stock Study company. You are encouraged, though not required, to bring your completed SSG to the session. Learn SSG tips and techniques, how to use analysts estimates and company research to make your SSG judgments. All investors are welcome to join. **Second Saturday September-March and First Saturday, April 5, 9:30 a.m. to 11:45 a.m. ET**

**Deep Dive In Sin Stocks** - Looking for a unique stock to study or a little extra spice in your portfolio? Consider vice investing, or investing in "sin stocks," as a point of diversification. Explore four specific industries in the "sin stocks" and walk away with a stock study to share with your friends or investment club. In each presentation, there shall be half hour of industry analysis and half hour of specific stock study. The series commences January 14, 2025, and will meet monthly, January-April, on the **second Tuesday, 7:30 p.m. to 8:30 p.m. ET:**

**Alcohol - January 14, 2025**  
**Tobacco - February 11, 2025**  
**Gambling - March 11, 2025**  
**Adult Entertainment - April 8, 2025**

## NEW MEMBER WELCOME

**Virtual 30 minute gathering, favorite beverage, and cameras ON** - Attend the "invitation only" gathering for new BetterInvesting members. Introduce yourself, learn how the South Florida Chapter can support you, and have your questions answered. **Second Saturday, September - April, 9:00 a.m. to 9:30 a.m. ET**

## MODEL INVESTMENT CLUB

**Investment Club Operations, Education, and Stock Study** - Attend the South Florida Chapter Model Investment Club to gain new knowledge or to expand, and/or refresh your knowledge of how to operate a BetterInvesting investment club using the BI principles and methodology. Guests and individual BI members are always welcome to attend and invited to participate. **Third Saturday monthly, January to December, 10:00 a.m. to 12:00 p.m. ET**

## CHAPTER OPERATIONS

**Board Meetings** - Virtual meetings held the **second Saturday of September and November 2024, and January and March, 2025, 12:00 p.m. to 1:00 p.m. ET**

**Annual Elections Meeting** - Open to BetterInvesting members **Saturday, April 5, 2025, 9:00 a.m. to 9:30 a.m. ET** Learn to Earn session follows the elections meeting.

**Planning Meeting** - Be part of making plans for the upcoming year on **Saturday, May 10, 2025, 10:00 a.m. to 12:00 p.m. ET**



## **Gain Confidence in Your SSG Forecasts**

*Contact the South Florida Chapter for Small Study Group Support*

*Gather a Small Group of Two to Eight Participants*

*Convenient Online Meeting Sessions*

*Contact the Chapter for Details and to Schedule*

**[contact@southflorida.betterinvesting.net](mailto:contact@southflorida.betterinvesting.net)**