

NEWSLETTER

Vol. 33 No. 1

Winter/Spring 2021

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INVESTOR EDUCATION WORKSHOP
Cancelled

REGISTER NOW Classes Winter/Spring

Enroll at the local website: www.betterinvesting.org as shown on p. 5. Members receive a discount by using the member number after the hyphen on the *Better Investing Magazine* label. **Out of town** classes and local contacts are listed on p. 3. The KC BI website shown at the top of p. 5 contains links to other Chapter information.

PRESIDENT'S MESSAGE



This is my first message in many years, but I still had the picture from that time. I quit producing messages because we needed the room for our events and pictures of people at those events and in clubs. We have few of those in this issue because of the very topic I want to address.

COVID-19 has eliminated our ability to meet in person for much longer than we anticipated almost one year ago. Because it has gone on so long and we do not see it ending soon, we are moving a few events to Zoom calls. This is an informal medium, and for that reason we will be hosting informal events. We will not be conducting SSG training nor the Investor Education Workshop. There are webinars available that address these areas. As a chapter board, we felt our purpose was to provide these kinds of events in person. To provide these types of webinars, we would have to invest in an application with webinar capability. We do not think that is cost effective for this chapter, so we expect to return to these events in person later in 2021. If you are interested in these types of events, you should already be receiving emails about them. If you are not, go to www.betterinvesting.org and sign up for the emails.

We ran a trial for an open meeting of the Model Investment Club in October and felt it went well. We will hold open meetings in February and April. We also want to hold Second Saturday events, which will discuss a topic for up to an hour and then open for questions for half an hour. There is no charge for these events, but we will require registration. More details can be found on page 2 of this newsletter. We plan to host three of these events and have topics for two of them. The first is titled Black Swan Investing, which starts with an investment strategy very briefly described by Nassim Nicholas Taleb in the book and expands to what Better Investing members might do. The second topic is Roth Investing, which will review the rules of Roth IRAs or funds, and discuss strategies that can be deployed at different times in life. We are open to suggestions for the third.

These are complex times, including for investing. We want to keep education alive and provide events so information can be shared. We invite you to join us and share. If you want to share any ideas or ask any questions, you also may email me or any of the other volunteers listed on the last page.

Our Regular Classes Will Not Be Offered Until Fall 2021

Basic Investing, SSG Classes and Workshops

The Kansas City Chapter of BetterInvesting™ again will use BetterInvesting software to teach the basic fundamentals of investing, as well as how to use the Stock Selection Guide (SSG). Emphasis is on understanding the SSG, visiting Internet research sites, judgment, and importing data using Online Premium Service and *StockCentral*. All SSG classes are progressive and require you to have an understanding of the information in the previous class.

Here are descriptions of each class and what you can expect:

Basic Investing: For those new to investing and who have minimal personal investing experience. Learn the basic fundamentals of investing, terms, ratios, understanding Value Line reports and completing the First Cut stock study on a company.

SSG I: For those who understand basic investing terms. This class emphasizes how to evaluate the fundamentals of a growth company, adding judgment using suggested research sources, and projecting future growth, utilizing BI Online Tools. SSG I is also for those who want to brush up on understanding the SSG.

SSG II: Building on the knowledge of SSG I, this class covers selecting a good price to pay for the company, understanding total return and how the “buy” price affects total return. Learn to use all features of the Online Tools, including screening for new companies to consider for investment. Also, the next step for those who attended SSG I as a refresher class in understanding the SSG.

Treasurer’s Workshop: Club Treasurer’s Workshop videos are available on betterinvesting.org under Learning Center / Investment Club or Additional Topics. You may also email questions to Dennis Boatright at drboatright4@gmail.com

SATURDAY STOCK STUDY SERIES

A Free Series Offered by the Kansas City Chapter

A free series open to the public will be offered on Second Saturday mornings of the month from 10:00 a.m. to 11:30 a.m. on Zoom.

Each session will open with a topic of interest to all investors, with the last 30 minutes open for discussion and questions concerning stock investing. Many of our members have asked for an opportunity to discuss specific companies. This is the opportunity to **Talk Stocks**. Bring companies you are interested in, and we can import the information into the *Toolkit 6* program and have a group discussion. Register online by Thursday prior to the meeting date at www.betterinvesting.org as shown on p. 5.

Zoom schedule:

Feb. 13, 2021 Black Swan Investing—Inspired by the book by Nassim Nicholas Taleb, we will discuss Taleb’s strategy and consider what a BI version might look like in a portfolio.

Mar. 13, 2021 Roth Investing—Review the rules for Roth IRAs, funds and rollovers and consider strategy.

Apr. 10, 2021 TBD—What do you want?

KC Chapter Area Programs Outside Kansas City

LEAVENWORTH, KANSAS

Contact Al Mueller: alcmueller@earthlink.com

Classes are scheduled from 8:30 a.m. to 12:30 p.m. at **Fort Leavenworth** in the Armed Forces Insurance Conference Room, 655 Biddle Ave.

Visitor access to Ft. Leavenworth: Allow 10-15 minutes to process through Visitor Control Center. The VCC is located north of Metropolitan Ave. & Hwy 7/73. Driving north on 4th St./Hwy 7/73, proceed through the Metropolitan intersection and drive to check in at the station. It will take a couple minutes to run your driver's license through NCIC-III System for access; then you will return to Metropolitan; turn right/West; then next right on to Ft. Leavenworth with your authorization.

ST. JOSEPH, MISSOURI

Contact Connie Rehm: c3j10r@gmail.com

A feature for this area will be *free* Second Saturday educational presentations by the KC Chapter. Sessions will be held at **Rolling Hills Library**, 1904 N. Belt St., St. Joseph MO. Schedule and presentation topics can be found on p. 4.

WICHITA, KANSAS

Contact John Kimmel: johnkimmel@cox.net

COLUMBIA, MISSOURI

Contact Hanna Klachko: hklachko@centurylink.net

SPRINGFIELD, MISSOURI

BetterInvesting members in the Springfield area who are interested in becoming a part of ongoing activities may contact the following:

Kathy McGovern: kathymcgovern1@att.net

Billie Nelson: billienelson@yahoo.com

Gene Toner: gtoner60@gmail.com

Own Your Share of America

Introduction to stock investing including a review of terms and the BetterInvesting philosophy. The class will be presented twice.

April 8, 2020 6:00-7:00 PM

Brentwood Branch Library
2214 S Brentwood Blvd
Springfield, MO 65804

April 9, 2020 6:00-7:00 PM

The Library Center - Springfield-Greene County
4653 S Campbell Avenue
Springfield, MO 65810

SEEKING BETTERINVESTING VOLUNTEERS

in areas of Kansas

Manhattan, Hutchinson, Salina, Dodge City, and other cities in KS

The KC Chapter of BetterInvesting includes all of Kansas and the western half of Missouri. We are seeking members who would like to serve as volunteers in their geographical areas to promote interest and investor education in a BetterInvesting community. This could include contacting new members, club visits, helping BI members access free Webinars on the BI website and utilize Online Tools and/or *Toolkit* software to complete the Stock Selection Guide (SSG). We currently have Satellite Chapters in Columbia MO, Wichita KS and Springfield MO. If you are willing to help with this or would like further information, please contact Al Mueller: alcmueller@earthlink.net

OPEN MODEL CLUB MEETINGS & STOCK TALK

Open Model Club Meetings of the Kansas City Chapter offer an opportunity to observe an experienced investment club in action. The meeting is open to persons already in clubs or those wanting to join a club or get a club started. The sessions are scheduled on Monday evenings from 6:15 p.m. to 8:00 p.m. Observers will have an opportunity to see the Model Club members review the portfolio of holdings and investigate new stocks through an Industry Study. Following the meeting, observers will have an opportunity to ask questions about investment club procedures, starting a club and/or maintaining the memberships and interest in their current club. All open meetings are *free and open to the public*. Register online prior to the meeting date at www.betterinvesting.org as shown on p. 5.

Feb. 22, 2021 Zoom

Apr. 26, 2021 Zoom

July 26, 2021 Check for location at www.betterinvesting.org

ARE YOU INTERESTED IN BECOMING A MEMBER OF THE KC MODEL INVESTMENT CLUB?

The Kansas City Model Investment Club is expanding its education program to enable any BetterInvesting member to join. This is a great opportunity to learn more about investing while belonging to the club. Some of our members have been in the club for over 20 years and have a wealth of investing experience. The club follows BetterInvesting principles, and you may learn more advanced investing skills.

This is a two-year program with the option to extend. The club is accepting a maximum of two new members at this time. We ask that you attend a minimum of two club meetings before deciding to participate. Your joining is contingent upon simultaneous membership in the KC Chapter as an Associate Director.

The KC Model Investment Club meets on the fourth Monday evening of each month, and the KC Chapter meets on the third Monday evening of each month.

If you have an interest in or questions about becoming a member of the Kansas City Model Investment Club, contact Al Mueller by email at alcmueller@earthlink.net or by phone: 913-682-1440.

MEMBER RESPONSIBILITIES:

1. Maintain a current BI membership
2. Attend, participate regularly and make regular investments in the Model Investment Club
3. Own a stock analysis tool or have access to BI Online Tools
4. Maintain a regularly accessed email account
5. Participate in an industry study at least once a year
6. Comply with the Model Investment Club Bylaws

We look forward to hearing from you and hope you will consider this offer.

Visit-A-Club Program

Would you like to learn more about participating in an investment club? This program will offer an opportunity to visit established investment clubs in your local area and to observe their application of BetterInvesting principles. The local BI website has a page of FAQs about the program. The KC Chapter is seeking BI investment clubs that are willing to hold open meetings for visitors to see your club in action. Please consider completing an application to be a part of this program. The application is available on the KC BI website. Further details will be forthcoming in the near future.

KC BI SPECIAL SERVICES

Does your club need a tune-up or do you have questions about club procedures, bylaws or record keeping? Directors from the KC Chapter will visit your club at *no cost* to you to discuss such issues. Directors have a range of knowledge on investing subjects, such as PE ratios, portfolio balancing, creating a watch list, debt to equity, earnings growing faster than sales and utilizing resources on the BI website. These educational topics usually take about twenty minutes of a club meeting. Customized classes are also available for your club to teach the **Stock Selection Guide I and II**. The classes will use *Toolkit 6* and the Online Tools in teaching the front and back pages of the SSG. Handouts will be provided. The cost for each class is \$10 per person with a minimum of \$100. Contact a BI Director listed on p. 9 of this newsletter to schedule these services. Your club will need to secure the location and work out a mutually agreed upon time and date for the session(s).

KC BI[®] DIRECTORS and VOLUNTEERS

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Al Mueller, Vice President	913-306-4723	alcmueller@earthlink.net
Bob Easton, Secretary	816-616-2549	bob@easton.net
Judy Weeks, Treasurer	816-741-0724	jaweeks99@yahoo.com
Janice Stonestreet, Chairman	913-451-0620	k5stoney7@aol.com
John Kimmel, Wichita	316-686-2731	johnkimmel@cox.net
Hanna Klachko, Columbia	573-443-7734	hklachko@centurylink.net
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Gene Toner, Springfield	417-559-0322	gtoner60@gmail.com
David Wallisch	303-588-4834	dwallisch@outlook.com
Diane White, Publicity	816-896-8850	Ldyhalmark@gmail.com

Home Office, Michigan:
www.betterinvesting.org
 1-877-275-6242 toll free

KC Chapter & BI Email Updates

The Chapter has an email distribution to remind both **BI members and non-members** of upcoming local and national events. This is a good way of alerting you to any changes in the planned schedule shown in this newsletter.

Let us know to include you in the monthly Chapter email. You can cancel at any time using this website:

www.betterinvesting.org

This takes you to the BI home page

1) Click on “[Find a Chapter Near You](#)”

The KC Area Chapter page contains links to **Local Events, Contacts, Visit-A-Club, Investment Club Support, News & Articles and Volunteering.**

2) To be included in KC Chapter emails, scroll down to **Learn More** and enter the requested information, then click “[Subscribe](#)”

3) You can unsubscribe at any time using this website.

Register Now Online

You can enroll in KC BI classes and programs online at:

www.betterinvesting.org

This takes you to the BI home page

1) Click on “[Find a Chapter Near You](#)”

Scroll down to Kansas or Missouri to select Kansas City Area

2) Click on “**Local Events**”

3) Click on the class you want to attend

4) Select “Click here to Register Online” which takes you to [Eventbrite](#) to register