

*BetterInvesting's™ Online Chapter
Monthly Bulletin*

May 2022

Volume 1, Issue 4

Five Things This Month

16 May 2022 Next Wednesday !!	OLC Mentoring Workshop - featuring Bob Adams "Basic Rules - Investing for a Lifetime"
23-26 June 2022	BetterInvesting™ 70th National Convention (BINC-2022)
Right Now !!	Scott Horsburgh invites you to nominate your portfolio for a future Repair Shop BI Magazine article
25 August 2022	OLC Annual Membership Meeting: August 25, 2022
Real-Time Results	OLC Pilot Portfolio Contest 2022 Update
Recurring Quick Access Links	

OLC Webpage: [Online Chapter | Better Investing](#)

OLC Mentoring Workshop: May Program Preview

You don't want to miss this one!

Next Wednesday, May 18th at 8:30 pm (EDT) we have a very special guest, Bob Adams will be the presenter. Bob's is an acclaimed national BI speaker and is from Puget Sound Chapter. 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!

Bob will do a short presentation titled **Basic Rules—Investing for a Lifetime** and then lead us in a discussion that *you, our audience* will control, on either the featured topic or on any other investing topic of your choice.

Our next two sessions are on July 20, 2022 and September 21, 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](#).

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](#)

OLC Annual Membership Meeting: August 25, 2022

We will be holding our Online Chapter's Third Annual Membership Meeting on Thursday evening, August 25, 2022 from 8:00 PM to 9:30 PM EDT. Here is the [registration link](#) to reserve your seat.

While this is a chapter event, *all BetterInvestin* (BI) members and their guests are warmly welcomed to join us. You'll understand why in a moment.

Here's the program:

The meeting will start at 8:00 pm EDT with a short business meeting that will include the election of your chapter's leadership team of directors for the upcoming year and a spotlight celebration featuring all of our anniversary clubs.

Starting right on time at 8:30 pm EDT we will introduce our Keynote Speaker. Once again this year we will be hosting a distinguished speaker of national fame that you all know (and, admittedly, encourage you to attend the annual meeting). He is Scott D. Horsburgh, CFA.

Scott is president of *Provident Investment Management* and a nationally respected 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). Scott's presentation is "Repair Shop: Behind the Scenes."

We have more to share with you on Scott's *Repair Shop* that will certainly interest you in the next article, *Portfolio Tuneup Anyone?*

Following Scott's presentation, approximately 9:15 pm EDT, we will close the business meeting with a short year in review and plans our plans for next year to help you become a better investor. But the big news will be the announcement of our Fy2021 Portfolio Contest! You won't want to miss that!

So, mark your calendars and be ready to enjoy this special night of celebration and education. Here again, is the [registration link](#) to reserve your seat.

Portfolio Tuneup Anyone?

Do you love the “Repair Shop” articles in the BI magazine by Scott Horsburgh? If you do, consider sending submitting your club’s portfolio. It just may be accepted for a future article...or it may be featured in his future presentations at BINC. We encourage you take advantage of this unique opportunity to have an expert take a dispassionate look at your holdings.

Here are the instructions from Scott:

We need a portfolio statement including acquisition dates if possible; that helps us understand the environment in which a purchase decision was made.

It is highly recommended to include a narrative about club history, investment philosophy, and methodology.

The last request is to make someone available for follow-up questions; Dan and I typically request about 30 minutes of time on the phone for clarifications. The magazine likes to print pictures of clubs. Everything goes to Jan Jeffres at BI - janj@betterinvesting.org.

I’m looking forward to seeing submissions from clubs in the Online Chapter!

Scott D. Horsburgh, CFA

OLC Pilot Portfolio Contest 2022 - “current” status

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 5/11/2022

		5/11/2022
<i>Club</i>	Initial Value	Value Now
Jack Long	\$10,000.00	\$8,892.17
Yankee Model Investment Club	\$10,000.00	\$8,377.53
Let It Ride Investors of Carson Valley	\$10,000.00	\$8,290.45
Investors R Us	\$10,000.00	\$8,273.70
PYMWYMI Investment Club	\$10,000.00	\$8,217.66
TESTrch	\$10,000.00	\$8,192.09
Massaco Investment Club	\$10,000.00	\$8,012.84
Emanon Investment Club	\$10,000.00	\$6,776.16
Grand Total	\$80,000.00	\$65,032.62

* The TESTrch portfolio was a test entry and 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 with “Portfolio Contest” in the subject line.

Be watching for a future workshop notice inviting club representatives to collaborate with the chapter’s portfolio committee to develop rules for the contest that better reflect BetterInvesting’s™ philosophy and investing strategy.

Dan Perlman, [Portfolio Contest Chair](#)

BINC Registration

BINC is back and we’re looking forward to you joining us in Dallas for our 70th birthday. The convention runs from the 23rd through the 26th 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 before the window closes www.betterinvesting.org/binc.

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

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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

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