



March 2020 Newsletter

BetterInvesting Appoints Ken Zedel as New CEO



Effective March 2nd Ken Zedel has joined BetterInvesting (BI) as its new CEO. Ken brings a wealth of marketing and management experience to this job, as well as a keen interest and love for stock investing: he has been an investor since he was a teen. Most recently Ken was the Managing Director of the Detroit office of Isobar, a global digital agency. He and his team were responsible for providing digital marketing and technology solutions for Chevrolet, Cadillac, Buick and GMC. In this capacity he improved both revenue and profitability of the office. He has also worked for renowned advertising agencies including Leo Burnett and J. Walter Thompson. Ken earned his Bachelor of Arts degree from The University of Chicago.

In this role he will be responsible for the leadership and overall management of the BetterInvesting and ICLUBcentral organizations and communities. Ken will lead from the BI office in Madison Heights, MI. As CEO Ken will support a staff of 23 who are responsible for the daily operations of the organization. Among other responsibilities, this includes:

- Managing the \$2.53M annual budget and maintaining positive operating cash flow,
- 100+ national educational webinars and tutorials produced annually by BetterInvesting and ICLUBcentral,
- The BetterInvesting suite of online stock analysis tools: CoreSSG, SSGPlus, Stock Comparison Guide and Stock Data Service,
- BetterInvesting Magazine, published 10 times per year,
- Member and Customer Contact Center which operates 9:30 - 6pm ET, to answer questions, complete sales orders and provide general member and customer support, and
- Separate BetterInvesting and ICLUBcentral websites.

Ken succeeds Kamie Zaracki. Kamie is continuing being a speaker at investment events.

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Portfolio Contest Update

At the end of February the standings of the Portfolio Contest Clubs were as follows:

Club	Value
Tickuntie Investments	\$12,879.49
Piedmont Investment Club	\$11,542.63
Big Bucks	\$10,088.27
NC Model Club	\$10,083.64
Hickory investment Club	\$10,022.70
Legacy Investment Team	\$9,495.01
Triangle Investment Club	\$9,268.38
Paupers Investment Club	\$9,101.78
PPP Investment Club	\$8,111.15

The BetterInvesting philosophy of investing in good quality growth stocks shined in February, a month with sharp declines in stock prices. The S & P 500 index dropped 8.4 percent during February. The average contest portfolio only dropped 5 percent. Not totally what one wants but that's a 3.4 percent beat of the index! Six of nine the contests portfolios outperformed the index.

In February the Tickuntie Investments club had the best performance, with a 4.2 per cent increase in their portfolio value. They also had two of the three best performing stock, Dexcom and Nvidia, that each increased over 14 per cent. Dexcom distributes continuous glucose monitoring systems for diabetes management that eliminate patients' need to prick themselves. NVida designs graphics processing units for the gaming and professional markets. Some have speculated that, if the coronavirus spreads in the U.S., we will be encouraged to stay at home, possibly boosting gaming sale.

The Legacy Investment Team had the best performing single stock, Regeneron. Guess what? Regeneron is a coronavirus player. The US Department of Health and Human Services has tapped them to develop anti-bodies for the coronavirus.

Overall the S & P is only marginally higher than it was at the start of our contest. The portfolios in our contest are also close to where they were at the start. Each portfolio started with \$10,000. The average portfolio is now at \$10,066 vs. the same amount invested in the S & P (without fees) being at \$10,095. Invested in the SPY index with fees an investor would have \$10,048.

Congratulations to Clubs Celebrating Anniversaries

BetterInvesting (BI) honors clubs celebrating each 5th year anniversary. We admire and congratulate each North Carolina club having an anniversary for their dedication and successfully sustaining their activities. We hope, as we know is true in some cases, that their portfolios have prospered. If we have not already arranged a Director to visit each of these clubs in person or via the Go2Meeting videochat system, we would be delighted to visit with club

members to say congratulations and learn more about your activities. Email:
contact@northcarolina.betterinvesting.net

Clubs Celebrating Anniversaries

Club	Anniversary	Location
Ro Buck Investment Club	50	Salisbury
Willoughby Investment Ptr	35	Greensboro
Double-N-Five	25	Winston Salem
\$ In The Black \$	25	Greensboro
Something Ventured Inv Club	25	Cary
Capital Area Share Holders	25	Cary
Oconee Investors Club	25	Chapel Hill
Mills-Snyder Investment Club	25	Lumberton
Market Mavens Investment Club	25	Hickory
Millionaires To Be Inv Club	20	Raleigh
T2DN Inv Club	20	Supply
New Friends Of Carolina	20	Davidson
Money Changers	20	New Bern
Pour Folk Investment Club	5	Marion, VA

Upcoming BetterInvesting Webinars

CoreSSG Stock Analysis Tool Tutorial

Ann Cuneaz

Thursday, March 12th, at 8:30 pm EDT

This tutorial will demonstrate how easy it is to do a stock analysis using the CoreSSG. The CoreSSG is a very helpful tool to assist new investors learn the basics of fundamental stock analysis. New as well as more experienced investors can use their judgment to actively complete a Stock Selection Guide (SSG) to determine if a stock is a buy, hold or sell. In the tutorial Ann Cuneaz will use Monster Beverage (NASDAQ: MNST) to demonstrate the steps of an analysis. This feature-rich application is just what you need to give a boost to your investment returns. If you are not yet a subscriber to the CoreSSG, BI invites you to try it free using the [free trial version of the CoreSSG Stock Analysis Tool](#).

Instructor Ann Cuneaz is BI's Senior Manager of Education Programs.

Features of Your BetterInvesting Membership

Wednesday, March 18th, at 8:30 pm EDT

BetterInvesting Membership has many advantages - if you know what they are and how to use them. This webinar will orient you to the new BetterInvesting member website to help you get the most from your membership. We'll show you how to get started quickly, where to find our educational resources, BetterInvesting's time-honored stock selection tools, stock

ideas and reports, how to start an investment club and more. Whether you're a new member or just need a refresher, you are sure to learn some valuable tips to help you get more from your BI membership and become a Better Investor.

Club Treasurer Workshop: Handling Member Withdrawals

Thursday, March 18th, at 8:30 pm EDT

When a member withdraws from an investment club, either partially or in full, the treasurer and remaining partners are faced with several decisions and the task of properly recording the transaction. In this webinar, investment club expert Doug Gerlach reviews best practices for handling member withdrawals and demonstrates step-by-step how to enter the various steps of a withdrawal into the club's books. In addition, Doug reviews the tax consequences of a member's withdrawal. This webinar is especially good club treasurers.

Model Club

Our chapter also sponsors a [model investment club](#). Its purpose is to demonstrate the best practices for BetterInvesting investment clubs and the educational benefits of being a member of an investment club. Recordings of Meetings are now being made available for viewing.

The NC Model Club typically meets the first Tuesday of each month in Triad area libraries. Via Go2Meeting you can also participate from anywhere you have an internet connection. If you would like to be reminded of our meetings, please contact contact@northcarolina.betterinvesting.net. We will be happy to add you to our "Model Club Interested Parties" email distribution list and provide you with the details of our model club's next meeting.

Volunteering Opportunities

The North Carolina Chapter of BetterInvesting thrives because of the energies volunteers contribute to it. The Chapter welcomes additional BI members becoming involved in Chapter activities. Given the chapters use of Go2Meeting and internet mediated communication, members throughout our membership area can help. At present volunteers are especially sought for:

A secretary to take minutes of the Chapter's monthly meeting of the Directors.

A new Newsletter Editor to replace the current Editor who is leaving North Carolina.

Volunteers to represent the NC BetterInvesting chapter in geographical areas such as Charlotte, Hickory, and Fayetteville.

2019-20 North Carolina BI Chapter Directors and Volunteers

Terry Gilbert —President
Tanya Robinson-Caldwell —Vice
President
Ronald Cox—Assistant Secretary &
Chapter Data Manager
Warren Leggett—Treasurer
David DeBruhl
Jane Chatterjee

Kathy Dougherty
Jacqueline Jahn, Volunteer
Susan Jordan, Associate Director
Brenda Jones, Associate Director
Daniel Perlman
Saundra Scales
Tasia Mabry, Associate Director
Louise Sechler—Director Emeritus

Contact Information and Web Addresses:

Contact: contact@northcarolina.betterinvesting.net

North Carolina Web site: <https://www.betterinvesting.org/ncarolina>

National BetterInvesting Web site: www.betterinvesting.org