

# Online Chapter First Annual Meeting

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Presented By  
Online Chapter Board

July 30, 2020

[WWW.BETTERINVESTING.ORG](http://WWW.BETTERINVESTING.ORG)

# Program Timeline

8:00 - 8:30 PM ET Business

- First annual meeting report
- Online Chapter Plans
- How to volunteer with the Online Chapter
- Director elections

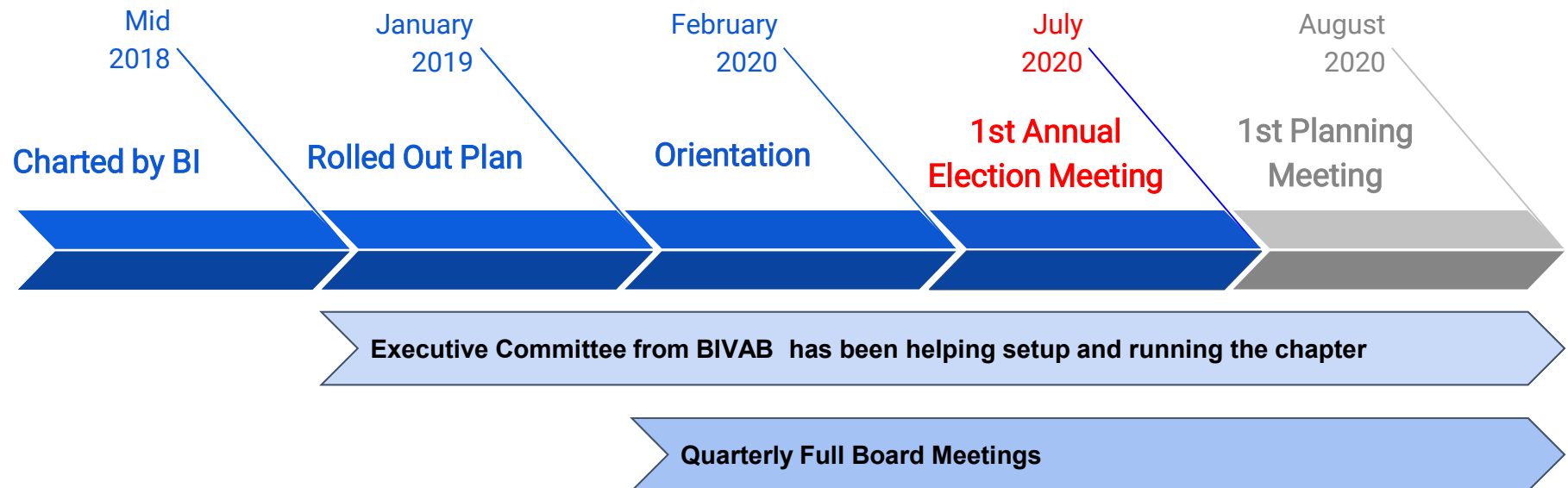
8:30 - 9:45 PM ET National Education Program

“Playing the Investment Piano with both Hands”  
by Saul Seinberg, Online Chapter Director

# Agenda

- Annual Meeting Report
- Online Chapter Plans
- Volunteer with the Online Chapter
- Director Elections
- Education Program

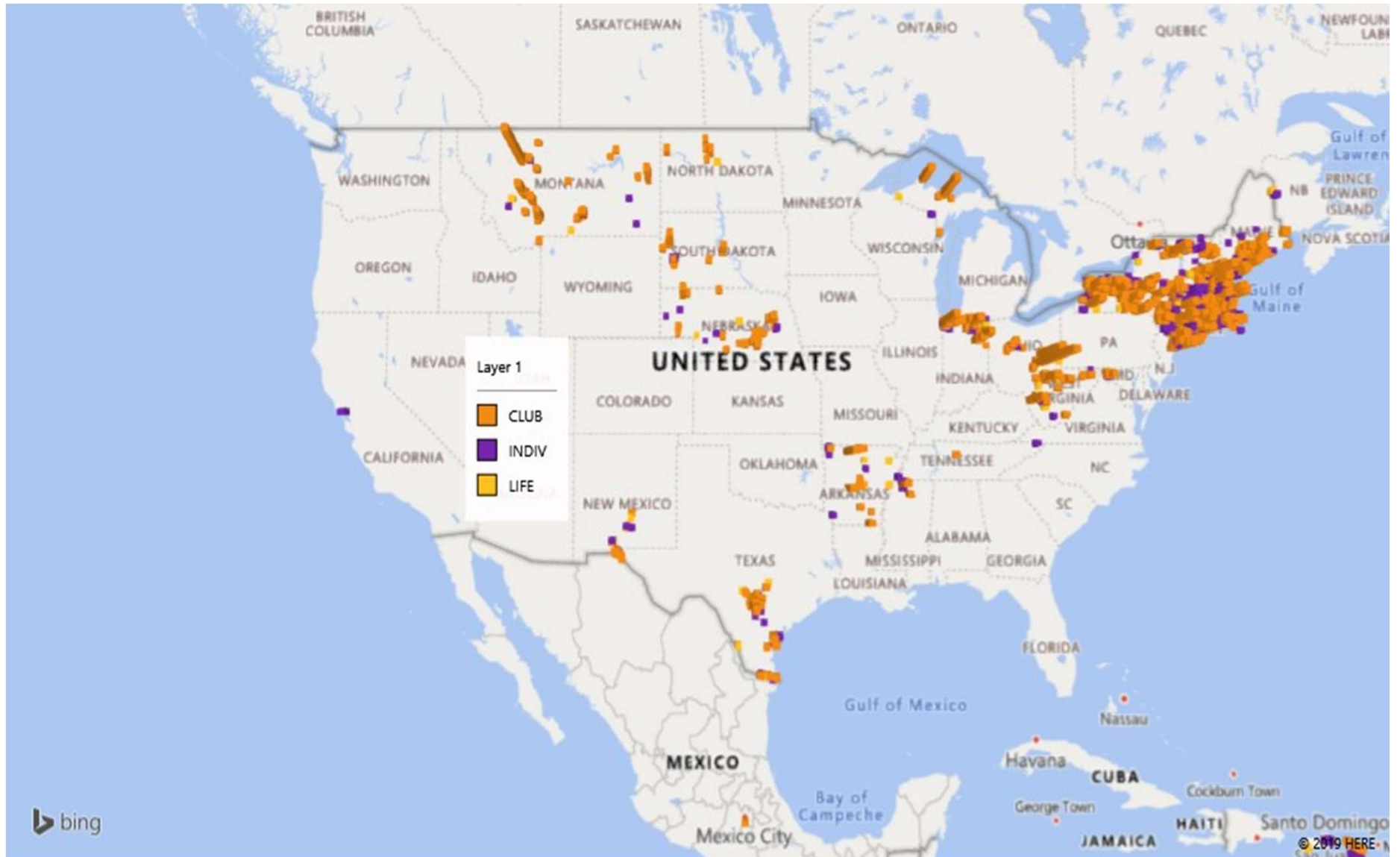
# Online Chapter Milestones



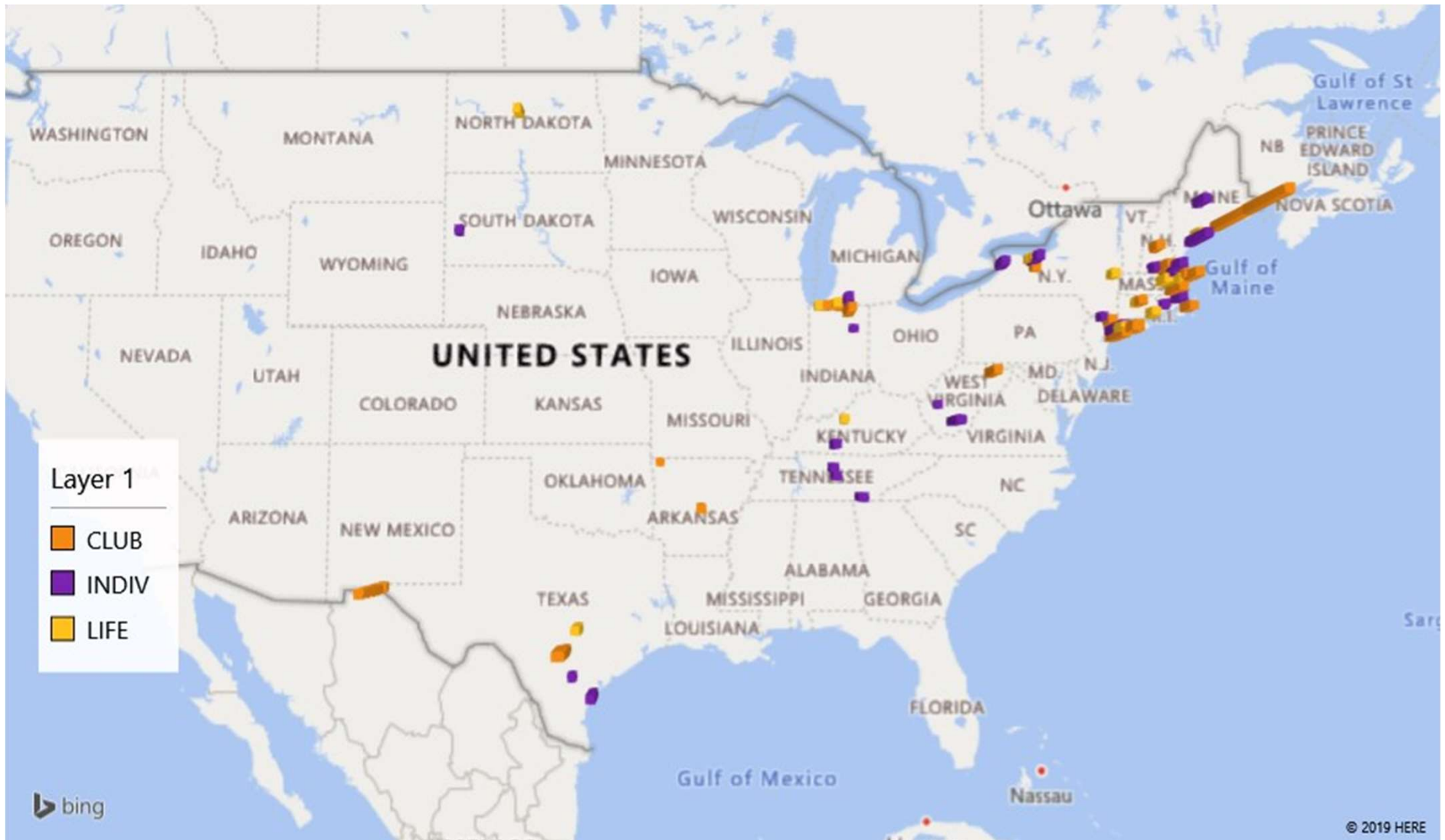
# Online Chapter Quick Facts

- Membership: 3,335
- Club members: 2,109
- Clubs: 391
- Model stock investment clubs: 9
- Anniversary clubs: 59
  - 5 of them are 60 year celebrations!
- Volunteers: over 60 with 29 partners in 20 clubs

# Online Chapter Member Location



# Online Chapter Volunteer Location



# Online Chapter Board

## Officers

- Chair: **Joan Loken**
- President: **Jane Chatterjee**
- Secretary: **Bob Houle**
- Treasurer: **Cliff Trent (BI)**

## Committees by Function Areas

- VP Club Support & Visits: **Howard Johnson**
- VP Education & Outreach: **Linda Hunt**
- VP Model Clubs & Visit-a-Club: **Joe Farrell**
- VP Membership Communications: **Jie Eagleson**

**BetterInvesting Liaison: Dennis Genord (BI)**



# Core Program Areas

- Club Support - VP, Howard Johnson
  - Support club visits
  - Present the anniversary certificates
- Education and Outreach - VP, Linda Hunt
  - Develop “ready-to-go” classes
  - Form outreach committee
- Model Clubs and Visit-a-Club - VP, Joe Farrell
  - Support model clubs
- Membership Communication - VP, Jie Eagleson
  - Inform model club meetings and events on Interspire, chapter website, and chapter Facebook











# Satellite

- **Chapter Satellites:** “A chapter satellite is a group of BetterInvesting directors living some distance from the chapter’s primary base of operation. Satellite directors conduct chapter-sponsored activities in the satellite area. Chapter Satellites are subsidiaries of their chapter and operate under the umbrella of the chapter.” - *From Chapter Bylaws*
- Satellites are areas having a cohort of volunteers who are trained, ready, willing and able to serve to support the members in that geographic area.

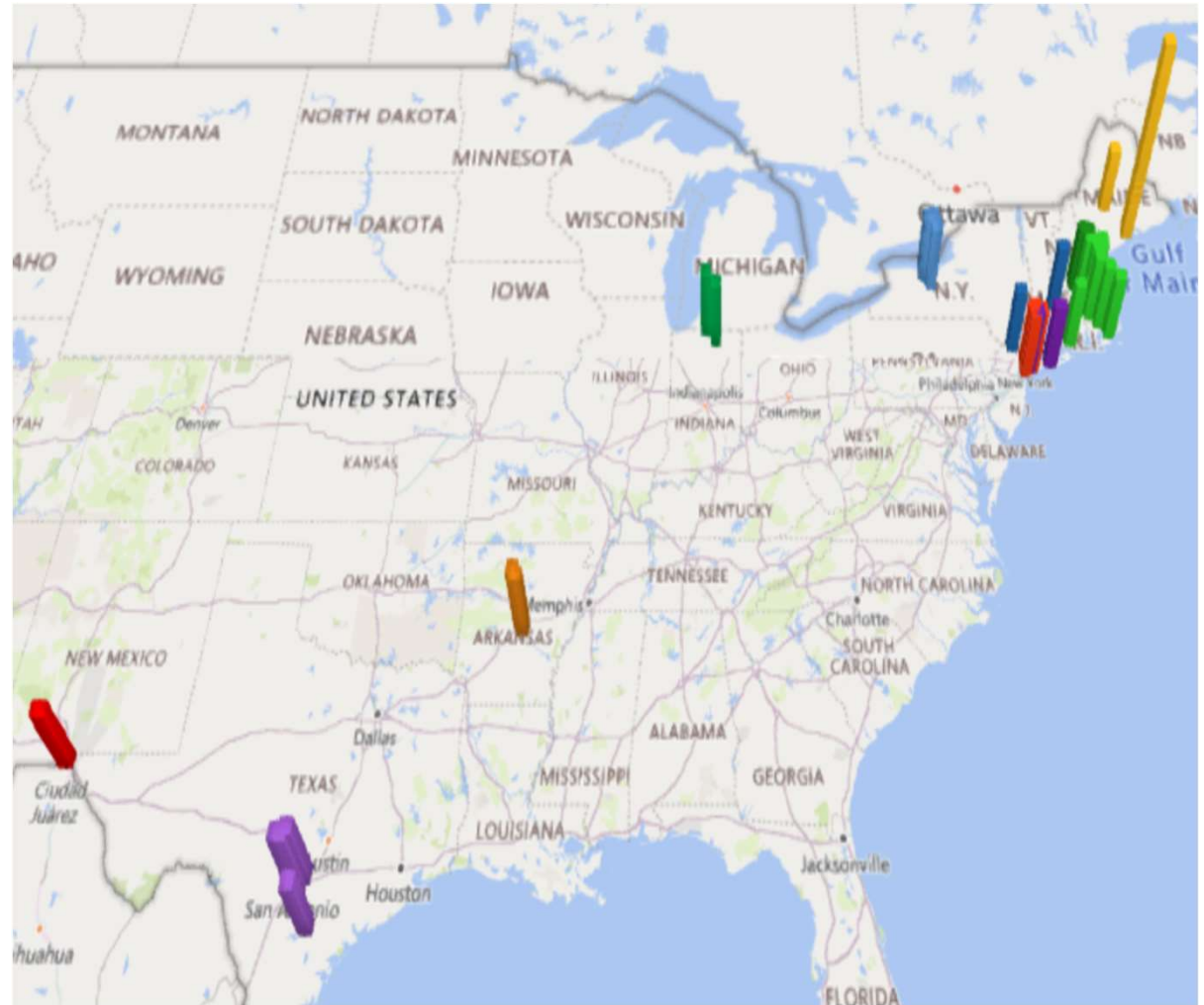
# Satellite Goals

- To establish a core group of volunteers for each satellite
- Support Satellite members with education, training, planning, programs and funding
- Create a local BetterInvesting presence for our Online Chapter members
- Satellites actually activated depends on availability of volunteers to serve the membership

# Potential Satellite Locations

-  OLC-Satellite-Arkansas
-  OLC-Satellite-Long Island
-  OLC-Satellite-Maine
-  OLC-Satellite-New Hampshire
-  OLC-Satellite-New York City
-  OLC-Satellite-Rochester
-  OLC-Satellite-South Bend
-  OLC-Satellite-South Texas
-  OLC-Satellite-SW Desert
-  OLC-Satellite-Yankee

*Subject to availability of  
current & future volunteers  
in the geographic area*



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# FY 2021 Planning

- September Online Chapter planning meeting - the new leadership team will develop plans
- Executive Committee members from BIVAB phase out during the year
- Online Chapter volunteer board will lead the chapter
- Recruit & train volunteers to serve in Satellite operations and Board committees
- Board will develop & conduct membership programs in such areas as:
  - Club support and visit
  - Member education
  - Outreach events
  - Model club operations

## FY 2022 and Beyond ...

- Run as a traditional chapter ... but online
- Expand opportunities for the general Online Chapter membership to participate in operation and leadership of their chapter
- Develop national education program for Online Chapter membership (open to all BI members)
- Working on “town hall” type forums to work with affinity grouping on various investing education initiatives of interest to these local groups

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# How Can You Help?

Areas	Volunteer Needed	VP
Club Support	<ul style="list-style-type: none"> <li>• Present anniversary certificates</li> <li>• Club visits</li> </ul>	Howard Johnson
Education & Outreach	<ul style="list-style-type: none"> <li>• Form Outreach Committee</li> <li>• Develop classes</li> </ul>	Linda Hunt
Visit-a-Club	<ul style="list-style-type: none"> <li>• Enroll your club to the Visit-a-club program</li> </ul>	Joe Farrell
Membership Communication	<ul style="list-style-type: none"> <li>• Bulletin/newsletter content contributor</li> <li>• Maintain social media</li> </ul>	Jie Eagleson
Satellite	<ul style="list-style-type: none"> <li>• Club visits</li> <li>• Presenting Anniversary Certificates</li> <li>• Providing a personal touch to our local Online Chapter Members</li> <li>• Community Outreach</li> </ul>	Susanne Koster

# Becoming a Volunteer

01

**Volunteer**

A BetterInvesting member who wishes to contribute to the chapter education mission

02

**Associate  
Director**

A volunteer who wants to take on additional responsibility for programs and activities to gain experience to serve on the Chapter Board

03

**Director**

A volunteer who wants to be involved in the leadership and management of the Chapter Board

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# Slate of Directors

Jie Eagleson

Hany Michael

Dan Perlman

Saul Seinberg

Susanne Koster

Rosemary Weymouth

# Director Elections



**Jie Eagleson**

- BI member since 2013
- Served the Sacramento Chapter Board for 6 years
- Co-Found of IMSIC
- National Volunteer since 2018



**Hany Michael**

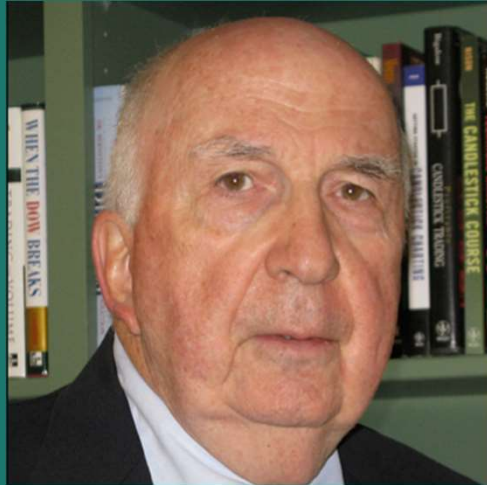
- BI member since 2009
- President of International Model Stock Investing club
- National Volunteer since 2019



**Dan Perlman**

- BI member since 1992
- Served President North Carolina Chapter
- National Volunteer since 2020

# Director Elections (Cont'd)



**Saul Seinberg**

- BI member since 1995
- Served as a volunteer, Director, and VP Education for the Rocky Mountain Chapter for 6 years



**Susanne Koster**

- BI member since 1996
- Founder of Emanon Investment Club
- Served New York Chapter for 6 years



**Rosemary Weymouth**

- BI member since 1999
- Volunteer since 2004

# Vote by Poll

Online Chapter members are eligible to vote.



# Online Chapter Links



[contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net)



<http://facebook.com/onlinechapterbi>



[www.betterinvesting.org/online](http://www.betterinvesting.org/online)



# Questions



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# Education Program

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# Questions



