

CHICAGOLAND CHAPTER NEWSLETTER
Serving Chicago and North/South Suburban Counties & Beyond

PRESIDENT'S MESSAGE

What BetterInvesting Means to Me. When I have a discussion with people about stock investing, it doesn't take long before my thoughts turn to the benefits of BetterInvesting. Many have asked "why should I join BetterInvesting"? Well, here is my story.

In 1996, my remarkable journey into the world of investing began with the congregation of Salem Baptist Church of Chicago and their collaboration with BetterInvesting. The church partnered with BetterInvesting to equip its members with the skills to evaluate companies using BI methodology. Inspired by this initiative, I took the next step and established a couple of investment clubs, inviting friends and family to join.

My journey extended to volunteering within my local chapter. Today, I proudly hold the position of President of the Chicagoland Chapter, a role that allows me to contribute my knowledge and expertise to our community. Through this journey, I have acquired valuable insights into stock selection, evaluation techniques, and the art of discussing the pros and cons of investment decisions. But this journey has not been solely about financial growth; it has also been a source of meaningful friendships and connections. I have had the privilege of networking with individuals from diverse backgrounds, spanning the globe. Annually, we come together at the BINC conference, an event that fosters knowledge sharing and camaraderie, giving me an opportunity to keep learning. Being part of BI has been a profound and enriching experience. As I look ahead, I eagerly anticipate the continued privilege of working with this wonderful group, as we collectively strive to empower individuals with the tools and knowledge to secure their financial futures.

I know that my story is not unique in the BI community. This organization has helped tens of thousands of everyday people secure their financial future by following its basic principles of investing regularly, reinvesting all earnings, buy growth companies and diversify to reduce risk. Share your thoughts with me by emailing me at

president@betterinvestingchicagoland.net

Sheryl Carter, President

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Honoring Dean Hartley – Longtime Volunteer and Colleague



The Chicagoland Chapter announces the passing of former chapter director, **Dean Hartley**. Dean was a long-time member of BetterInvesting. He became a director of the Chicago West Chapter and served as President of the chapter for over 10 years. As chapter President, he was heavily involved in chapter activities including education and setting the chapter's strategic direction. He was involved in investment clubs over the decades. He was also instrumental in planning and participating in the Chicagoland Investor Expo, a regional convention, formed by the Chicago-area chapters. Dean continued to be active in chapter activities when the Chicago West and Chicagoland chapters merged.

Dean was a devoted husband, father, grandfather, and great grandfather who was warm, genuine, and gave compliments easily. He had a full and interesting life. He was kind, polite, curious, inquisitive, and enjoyed a good laugh. He will be missed by all.

Have Your Investment Club Visited by a Chicagoland Chapter Director

All Chicagoland chapter members are entitled to have their club visited by a chapter director. What happens at a club visit?

- Your club can find out what's new on the BetterInvesting website and how to get the most out of this great tool. The website has a mobile-friendly design with better navigation and optimized search function.
- Many clubs use a club visit to have their portfolio reviewed. A portfolio review can help you determine if you are meeting your goals.
- Does your club want to better understand the Stock Study Guide (SSG) and other online tools such as the heat map, the Stock Comparison Guide, and the portfolio management tools? A club visit can be designed to your club's specific needs.
- Lastly, your club can ask questions on any investment topic and get great answers that explain BetterInvesting methodology and have fun with your local volunteers.

Take advantage of this service for your club by calling our chapter at contact@betterinvesting.org.

New Investment Club Connect

In the BetterInvesting annual member survey, many members asked for a better way to help BI members find investment clubs to join. BetterInvesting has answered the call with Investment Club Connect, an exciting new program that helps clubs and individuals find each other.

Here is how it works:

- **Individual members raise their hands to initiate the connecting process.** NAIC/BetterInvesting will maintain a confidential list of individual members looking for a club, as well as NAIC/BetterInvesting investment clubs who are open to adding members who have registered with the Club Connect program.
- **Individual information is presented to existing clubs** using custom matching technology based on gender, distance and other filters.
- **Clubs then consider adding the individual to their club.** If interested, the club then reaches out directly to the individual member.
- **There is no obligation on the part of either party.** Think of it as investment club dating!
- **There is no cost to enroll in this program.** This is an exclusive service provided to BetterInvesting clubs and members.

With Investment Club Connect, it's now easier than ever for clubs to find like-minded members who are interested in joining an investment club. The program was designed to help members and clubs connect seamlessly. Look into the Investment Club Connect and find new friends.

JOIN US @ BINC 2024

The **BetterInvesting National Convention (BINC)** is returning to Chicago, Illinois May 16th through May 19th at the Chicago Marriott O'Hare Hotel. BINC is a great place to share the opportunity to increase your investing knowledge with friends old and new. This year's BINC will have a variety of classes for investors of all levels, including many that will be offered for the first time. Your registration includes:

- 60+ Investor Seminars and Panel Discussions
- Beginner Series with a hands-on-lab
- Beyond the Beginner Series with a hands-on lab
- Effective Stock Selection
- Income Investing
- Options Investing
- Investing in Retirement
- Portfolio Management
- Keynote Speakers
- Convention Meals
- Opening Bell Ceremony Thursday night
- Closing Bell Ceremony Sunday with door prizes

More information on these activities and how you can participate will be coming soon. Stay-tuned to the BetterInvesting website at www.BetterInvesting.org for additional details on the event, as well as travel and hotel arrangements.

Learn from national BI speakers, catch up with old friends and meet new people at what will prove to be a fantastic event in our own backyard. **Register at www.betterinvesting.org/binc.**





Have Your Club's Portfolio Reviewed

Ever wonder how well your club is doing? Portfolio evaluations are performed by Chicagoland chapter directors who analyze your club's portfolio and review the results at your club meeting. The analysis is provided using BetterInvesting tools, including portfolio management analysis and director expertise to evaluate your portfolio. We will assist in determining if your portfolio is meeting your club's goals. This is an educational tool offered free of charge to your club.

Take advantage of this service for your club by emailing us at contact@betterinvesting.chicagoland.net.

Want to join the BetterInvesting volunteer nation? The Chicagoland chapter is always looking for energetic people who are willing to work in a team, pitch in and have fun in the process. Not only will you share time with like-minded people, but you will also learn a tremendous amount about investing and BetterInvesting methods. Are you interested in hearing more? Email us at contact@betterinvesting.chicagoland.net.

Chicagoland Directors, Associate Directors and Volunteers

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|---------------|------------|----------------|-------------|----------------|
| Bill Barnes | Mary Jaffe | Akari Muhisani | Paul Rom | Shirley Truss |
| Sheryl Carter | Judy Moran | Wilma Rice | Sue Spurlin | Rosemary Wyche |
| Ray Giese | | | | |

Important Notice to our Readers

BetterInvesting is a non-profit educational organization that sponsors programs and provides information through their local volunteer chapters for the education and use of individual investors and investment club members. BetterInvesting neither recommends nor endorses specific securities.