

North Florida Chapter

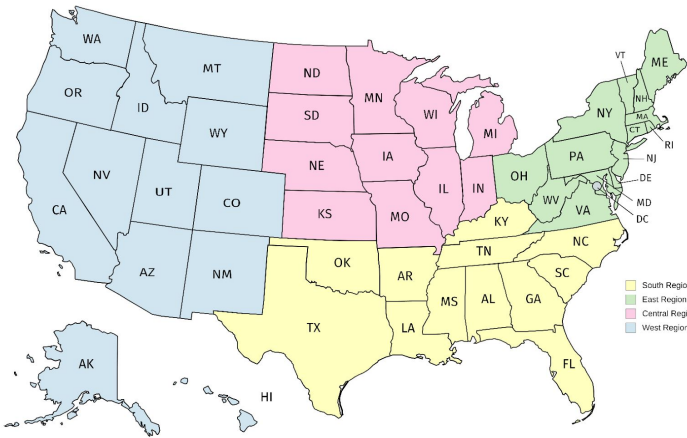
2022 Annual Meeting
September 1st, 2022

Brent Campbell
President
North Florida Chapter

Annual Meeting Agenda

- Introduction & Welcome
- Overview of the Chapter
- Election of Directors
- Portfolio Contest
- Anniversary Club Celebrations
- Educational Presentation - Doug Gerlach
- Volunteering to Serve BetterInvesting members
- Feedback from the Membership
- Closing Comments

BetterInvesting



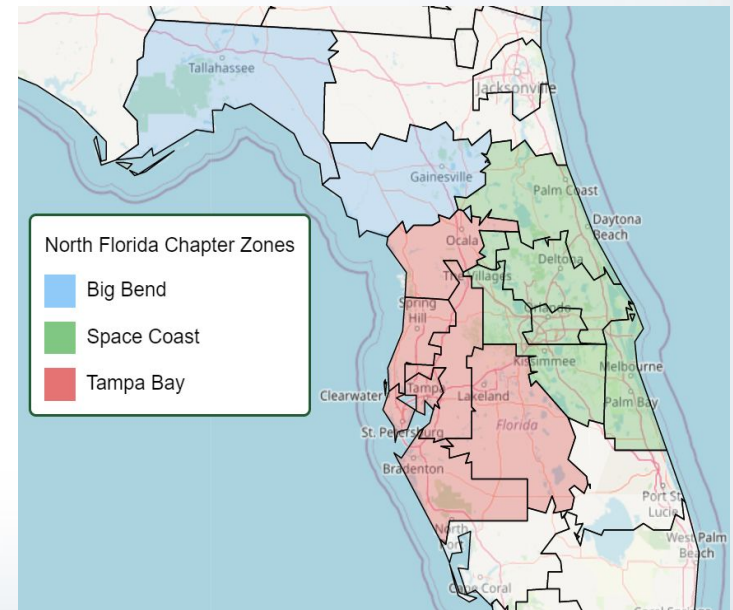
BetterInvesting is a non-profit organization providing investment information, education and support that empowers members to become successful, lifetime investors.

Founded in 1951, *BetterInvesting* has provided investment education to more than five million people and is a charter member of the World Federation of Investors, which provides investment education in many countries worldwide.

Chapter Overview

Our chapter supports over 400 club members in over 50 investment clubs and almost 300 individual *BI* members in the central part of Florida, from the Atlantic to the Gulf Coast from Port Charlotte north to the Big Bend/Tallahassee area.

Our chapter is chartered by *BetterInvesting* to provide support to all BI members in our area of training responsibility. In the central Florida area we are responsible for carrying out the mission of *BetterInvesting* through member training, assisting in forming new stock investing clubs and, through a public education program introducing new members to the benefits of fundamental, long term investing the *BetterInvesting* way.



Chapter Mission & Vision



CHAPTER MISSION:

Our mission is to provide skilled instructors and infrastructure for the education, training and mentoring of all BI Chapter members so they may fully develop the investing skills needed to achieve their financial independence.



VISION:

Our vision is to be a recognized leader within the BetterInvesting community on membership training and education support.

Annual Meeting Agenda

- Introduction & Welcome
- Overview of the Chapter
- **Election of Directors**
- Portfolio Contest
- Anniversary Club Celebrations
- Educational Presentation - Doug Gerlach
- Volunteering to Serve BetterInvesting members
- Feedback from the Membership
- Closing Comments

Meet Your Volunteers

Chapter board members are unpaid volunteers with a passion for assisting and educating local clubs and individual investors

North Florida Chapter's Honor Roll - National Recognition

Thomas O'Hara Award for Chapter Service	Jim Gallagher - 2022 Robin Ware - 2021 Ken Peters - 2016
Dick Dwyer Service Award	Joan Fosdick - 2017
Kenfield-Burris Online Service Award	Dan Harter - 2020 Laura Scott - 2019 Ken Peters - 2010
Kenneth Janke Lifetime Achievement Award	Phil Crocker - 2018

Volunteer Roster & Officer Positions for 2022-2023

Voting Directors			Associate Directors & Volunteers	
Term Expires 2023	Term Expires 2024	Term Expires 2025	Mickey Riemondy (2005) Auditing	
Jim Gallagher (2015) President, SCMIC	Phil Crocker (1991) VP-Membership	Laura Scott (2007) VP-Communications	Ben Shuler (2011) Newsletter Editor	
Sam Mortellaro (2016)	Howard Tetrault (2000) Treasurer	Bob Houle (2007) Web Master	Directors Emeritus	
Brent Campbell (1998) Past President	Joan Fosdick (2006) Secretary	Brian Fitzgerald (1998)	Dick Vogel (2000) Ken Peters (1994) Doyle Campbell (1997)	
Robin Ware (1997) President	Dan Harter (2001) VP-Education & Training	Thomas Brooks (2021) VP-Club Support		

Slate of Directors/Associates – 3 year terms

Class of 2025

Laura Scott
(2007)
VP-Communications

Bob Houle
(2007)
Web Master

Brian Fitzgerald (1998)

Thomas Brooks
(2021)
VP-Club Support

Election of Directors for Class 2025

Only North Florida Chapter Members
are Eligible to Vote



- **YES = I vote for the Slate of Directors**
- **NO = I Vote against the Slate of Directors**
- **Abstain (we would like all chapter members present to vote)**

Election of Directors for Class of 2025

For all BI members in the North Florida Chapter
please use the Question Box please enter your vote

- **YES = I vote for the Slate of Directors**
- **NO = I Vote against the Slate of Directors**
- **Abstain (we would like all chapter members present to vote)**

Nominations from the Floor

Are there any nominations from the floor for becoming a BetterInvesting Volunteer with the North Florida Chapter?

Annual Meeting Agenda

- Introduction & Welcome
- Overview of the Chapter
- Election of Directors
- **Portfolio Contest**
- Anniversary Club Celebrations
- Educational Presentation - Doug Gerlach
- Volunteering to Serve BetterInvesting members
- Feedback from the Membership
- Closing Comments

2022 Dream Portfolio Final Results

Congratulations! To this years Finalists.

Clubs

1. Blue Chips & Salsa - \$100 Winner (**-9.81%**)
2. Space Coast Model Investment Club - \$50 Winner (**-11.77%**)
3. St Pete Investors Club (**-19.35%**)

Individuals

1. Alice Tenney - \$50 Winner (**-4.47%**)
2. Dean Printy - \$25 Winner (**-5.43%**)
3. Laura Scott (**-6.02%**)

NFC Chapter Clubs register [here](#) for the 2023 Portfolio Contest

Annual Meeting Agenda

- Introduction & Welcome
- Overview of the Chapter
- Election of Directors
- Portfolio Contest
- **Anniversary Club Celebrations**
- Educational Presentation - Doug Gerlach
- Volunteering to Serve BetterInvesting members
- Feedback from the Membership
- Closing Comments

North Florida Chapter Annual Membership Meeting

Happy Anniversary to Our Clubs



September 1, 2022

Celebrations

- 20 Years:
 - Prosperity Seekers
 - Wisdom to Wealth Family
 - **Rags to Riches**
- 25 Years:
 - Arcanum
 - **Mother Earth**
 - **Tampa Bay Odd Lot Ladies**
 - **Women Taking Stock**
 - Southern Women
 - **North Suburban Ladies**
- 30 Years:
 - **Beanstalk of Miami**
- 35 Years:
 - Retire at Forty

Annual Meeting Agenda

- Introduction & Welcome
- Overview of the Chapter
- Election of Directors
- Portfolio Contest
- Anniversary Club Celebrations
- **Educational Presentation - Doug Gerlach**
- Volunteering to Serve BetterInvesting members
- Feedback from the Membership
- Closing Comments

Educational Presentation

DOUG GERLACH

President of ICLUBcentral Inc. (a wholly-owned subsidiary of BetterInvesting)

Leads ICLUBcentral's development of tools for investors and investment clubs

- EquityResearchService.com
- StockCentral.com,
- myICLUB.com
- and MyStockProspector.com

Editor-in-Chief of

- ICLUBcentral's stock investing newsletters
- Investor Advisory Service
- SmallCap Informer (which he also founded)

Written six books, including "Investment Clubs for Dummies", "The Complete Idiot's Guide to Online Investing", and "The Armchair Millionaire".

How Can We Help You?

What can we do to better serve you as an individual investor?

How can we help your club? New club members may need some mentoring?

Your Chapter is Here to Serve You



**Comment in the Question Box or email us
contact@northflorida.betterinvesting.net**

FOLLOW US ON SOCIAL MEDIA & UPDATE PROFILE

- Visit our Facebook Page - [@SPACECOASTBI](https://www.facebook.com/SpaceCoastBI/) or <https://www.facebook.com/SpaceCoastBI/>
- “Like” and “Follow” so you’ll get notified of events. Come see our new BI redesigned webpage - <https://new.betterinvesting.org/chapters/NorthFlorida>
- Update your BI Profile to check “Receive Chapter News and Events”
- Is your club looking for new members? Join the many Florida clubs that welcome visitors, you decide if it’s a right fit, let us know and we’ll add you to the list!

Remember . . .

Good Friends Won't Let Friends Retire
Broke
We Help Them Become *BetterInvestors*

Questions? Email us:

contact@northflorida.betterinvesting.net