

# BetterInvesting's™ Online Chapter Monthly Bulletin

September 2023

Volume 2, Issue 9

## What's New?

OLC Annual Meeting	Great Success: Online Chapter Annual Meeting and Doug Gerlach - Stocks in the "Maybe Zone"
OLC Mentoring Workshop	July Workshop on: Crypto and OTC - Recap
Membership and Satellites News	Membership and Club Visits
Portfolio Challenge	OLC Annual Portfolio Contest 2023-2024
Model Investment Clubs	Model Investment Club Meetings
BI National News	<a href="#">Recurring Quick Access Links</a>

## Online Chapter Annual Meeting and Doug Gerlach - Stocks in the "Maybe" Zone

Our Online Chapter Annual Meeting was a great success. Thank you to all the attendees of the meeting.

Some highlights:

Online chapter is the largest chapter with over 3000 members, 379 clubs, two online model clubs, spread over 35 states and territories. We have a great team of 26 volunteers that also include three BIVAB Directors on our team.

This year's accomplishments were summarized highlighting our successes in supporting OLC Members and Clubs with focused Education Programs, Supporting and Responding to Membership needs, enhancing Communication with Clubs and Members, and continuing to enhance education with a selection of Best of the Class webinars from a review of the BI video archive library.

All the clubs that celebrated the anniversary milestones were recounted. 14 clubs celebrated 1-20 year anniversaries, 20 clubs with 25th anniversary celebrations, 11 with thirty years, three each with 35th and 50th anniversaries, two had their 40th anniversary and four clubs celebrated their 50+ year anniversaries. Congratulations to all these great clubs.

The Chapter goals for the next year were discussed, the focus to "Engage and support our clubs and members" as the underlying objective and several strategies to continue this in the next year were presented. Our OLC Annual Planning meeting will be held on Monday September 11, 2023.

Congratulations to our newly elected board members. Our volunteers, associate directors, and directors are the backbone of the OLC and we appreciate their engagement to make OLC better.

Finally the OLC 2022-2023 Portfolio Contest was a great success. Nineteen Clubs and Individual members participated and Yuval Godlberg and Marie Bartolotta were the top two winners were recognized on the webinar. See below for the 2023-2024 Portfolio Contest information.

All members of the Online Chapter are invited to attend the monthly board meeting. This month's meeting will be held on September 11. Register once and you will receive meeting reminders for all future meetings. Wishing you a successful investment journey!

[REGISTER](#)

### **Doug Gerlach - Stocks in the "Maybe" Zone**

Doug's presentation was well received and an engaging discussion followed his presentation. We want to thank Doug Gerlach for an exceptional presentation. Doug is an expert in his field and we feel honored that he agreed to take the time to join us. Here is a link to his presentation.

### **Presidents Committee,**

**Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata**

## **OLC Mentoring Workshop**

The July Open Forum Workshop was a great success with Bryon Wolfe, CFOAF, sharing his experience with a mistake that many clubs make: not selling stocks. He gave an excellent presentation about considering Crypto and OTC as part of an investment plan. His conversational discussion of the challenges and opportunities of Crypto and OTC was well received and answered many questions of the BetterInvestors. If you missed the Workshop, catch the recording on YouTube channel: [BIOLC](#)

Our September's Mentoring Workshop, on the 20th (third Wednesday) at 8:30 PM Eastern will be an open forum and will discuss several topics of interest of OLC members

The meeting will also be simulcast on the BetterInvesting Online Chapter [Facebook](#) group and then uploaded to the OLC [YouTube](#) channel, where you can find all previous episodes.

*Chris McCarron, Membership Training & Education Chair*

## **Membership and Club Visits**

And – our club visits have become so popular we are actively seeking volunteers. Training will be provided. Please contact us at [membership@online.betterinvesting.net](mailto:membership@online.betterinvesting.net)

Join us at our annual planning meeting on September 11, 2023 at 8:30 PM. We'll discuss plans for the chapter and would enjoy hearing from you on how we can support you and your club.

Club visits for the 2022-2023 are wrapping up – we have visited 25 clubs to celebrate milestone anniversaries, presented short education sessions and chatted about club operations. We have a few more

openings for September – or get a jump on the new year and schedule your club’s visit in the next few months.

Your club visit may be tailored to your club. The visit is a chat among colleagues. The volunteer shares how their clubs operates. Many clubs we visited enjoy a short presentation on researching companies or a review of Stock Selection Guide – or an introduction to how to begin. There are new, rich features recently added. I have done a review for my club – the session enhanced their understanding and usability of the tools.

Visit our [Chapter Website](#) for more details or email [membership@online.betterinvesting.net](mailto:membership@online.betterinvesting.net).

## OLC Portfolio 2023-2024 Contest

### BetterInvesting OLC Portfolio Contest - Deadline for Entries Extended to 9:30 am ET September 5

With August 31<sup>st</sup> coming on a Friday preceding the Labor Day Holiday, the OLC Portfolio contest won't de facto start until the market opening on Tuesday, September 5<sup>th</sup>. Therefore, any club or individual wishing to enter can do so until the opening of NYSE at the end of the holiday weekend.

Two key features of entering are (a) selecting 4 to 7 stocks, and (b) allocating \$100,000 of imaginary money between them. For more information and /or entering the contest click on the links below:

[2023-24 Portfolio Contest Rules](#)

[2023-24 Portfolio Contest Entry Form.](#)

*If you have questions or suggestions regarding the Portfolio contest, please email [contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net) with “Portfolio Contest” in the subject line.*

*Dan Perlman, [Portfolio Contest Chair](#)*

## Recurring “Quick Access Links”

### BetterInvesting™ National News

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BetterInvesting™ 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 this valuable weekly bulletin.

## Model Investment Club Meetings

Model Investment Club meetings are sponsored by the BetterInvesting Online Chapter. They are FREE and open to all.

### [Yankee Model Stock Investing Club - REGISTER](#)

- Meets the 2nd Saturday of each month
- Next Meeting: **Saturday, September 9** at 11:00 AM ET

### [International Model Stock Investing Club - REGISTER](#)

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: **Monday, September 18** at 8:30 PM ET

