

Investment Club Application

Forming an investment club helps multiply the benefits of a BetterInvesting membership. It is an excellent way to stay focused, gain experience and accelerate your financial education as you work together to become more successful investors. Clubs give you wonderful advantages including **education, support, buying power**, and the **comfort and growth potential inherent in a COMMUNITY**. Please return this completed application to get started.

BetterInvesting clubs also have an opportunity to save money on one of their biggest expenses: *brokerage commissions*. Eligible clubs that open a club account at Folio Investing will have the annual account fee for the **Folio Investing Unlimited Plan** waived. *That's a \$290 value*. BetterInvesting dues-paying clubs with four or more paid members are eligible for this cost-saving benefit. For more information about Folio Investing, call Member Services at 877-275-6242, email service@betterinvesting.org or visit www.betterinvesting.org.

Club Dues \$48/Year (required)

Benefits of Club Dues include:

- Commission-free, unlimited trades through Folio Investing (\$290 value)
- *Investment Club Operations Handbook* (\$15 value)
- Support and education from local chapters
- Standard & Poor's quarterly stock reports
- General liability insurance (\$300 value)
- Optional fidelity bond insurance

BetterInvesting Membership Options (required)

Club Basic Membership – A Great Way to Get Started with BetterInvesting

Club Basic Membership - \$41.00/Yr. Per Club Member

Membership benefits include:

- BetterInvesting Magazine Subscription (print, digital, app)
- Access to "member-only" website
- Monthly Stock Study Webinars
- First Cut Stock Studies
- Live and Self-Paced Education
- Getting Started Curriculum
- Ticker Talk Webinars
- Local Chapter Training & Support
- Monthly BetterInvesting Newsletters
- Access to National, Regional and Local events
- Investment Club Learning
- Discounts on subscriptions, products and services
- Commission-free stock trades

Core and Plus Memberships – **Your best membership value.** These memberships include BetterInvesting's powerful online Stock Selection Guide – the Centerpiece of BetterInvesting's Stock Analysis Methodology

Active, educated members increase a club's earning potential. BetterInvesting's Club Core and Club Plus Memberships include BetterInvesting's online tools and resources that enable each member to master the BetterInvesting method of selecting quality stocks.

Club Core Membership - \$93.00/Yr. Per Club Member

The Club Core Membership is a complete BetterInvesting membership featuring all the benefits of a Club Basic Membership plus...

- 24/7 Access to BetterInvesting's Stock Data Service
- BetterInvesting's powerful yet easy to use online tools for stock analysis; the CoreSSG (Stock Selection Guide) and Stock Comparison Guide, plus much more!

Club Plus Membership - \$110.00/Yr. Per Club Member

- The Club Plus membership includes all the benefits of the Club Core Membership plus BetterInvesting's online SSGPlus (Stock Selection Guide).

Whichever membership you choose, you'll have full access (through online forums, discussion groups, events, and other communication channels) to the collective wisdom of the financially savvy BetterInvesting community!

Club Annual Cost: \$48 club dues + \$110 or \$93 or \$41 for each member

Investment Club Application

Complete and return this application. We'll send you everything you need to set up and operate your club. Club dues and membership fee should be included with application. If you have any questions, please contact Member Services at 877-275-6242 or at service@betterinvesting.org.

CLUB NAME _____
CONTACT PERSON _____
ADDRESS _____
CITY _____ **STATE** _____ **ZIP** _____
PHONE NUMBER _____ **EMAIL** _____

Complete information for each club member below – attach additional sheet if needed

BetterInvesting Membership
Club Plus w/Data Service
Club Core w/Data Service
Club Basic

- | | Name | Address | |
|----|-------------|-------------|--|
| 1. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| | Phone _____ | Email _____ | |
| 2. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 3. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 4. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 5. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 6. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 7. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |
| 8. | _____ | _____ | <input type="checkbox"/> \$110 <input type="checkbox"/> \$93 <input type="checkbox"/> \$41 |

Check enclosed made payable to BetterInvesting

AmEx Discover MasterCard Visa

| | | | |
|---|--------------------------|-----------------|--------------|
| Name of Credit Card Holder _____ | Membership Totals | \$ _____ | |
| Credit Card # _____ | Club Dues | + \$ | 48.00 |
| Expiration Date _____ Zip Code _____ | Grand Total | = \$ | _____ |
| Security Code # _____ (3 digit # found on back of your credit card, or 4 digit # on front if AmEx). | | | |

[Mail or fax completed form with your payment to BetterInvesting](#)

Mail: BetterInvesting, PO Box 220, Royal Oak, Michigan 48068, **Fax:** 248-583-4880

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