

# Better Investing - Pittsburgh Chapter Portfolio "Tune Up" Questionnaire

Has your club been around for a while? Do you enjoy reading the Repair Shop column in the BI Magazine?  
Would you like to know if you are following the Better Investing Principles?

If the answer is YES to any of these questions then you may want to take advantage of a program offered by the local Better Investing Pittsburgh Chapter. We offer a chance for your club to have their portfolio reviewed by our seasoned team of volunteers who will be glad to assess your portfolio diversification and level of risk. With your additional input, the team can also comment on your stock analysis techniques and purchase behavior.

**Please NOTE** that the analysis of your portfolio and preparation for a presentation **can take several weeks**. Please allow sufficient time for us to plan and prepare, as well as coordinate with you the time and date of your meeting.

If you would like to take advantage of this program, please fill out this form (including the information requested below) and send to:

**BetterInvesting Pittsburgh Chapter  
PO Box 101172  
Pittsburgh, PA 15237-8172**

You can email: [contact@pittsburgh.betterinvesting.net](mailto:contact@pittsburgh.betterinvesting.net) to obtain more information or answers to questions that you may have.

## Club Information

Club Name \_\_\_\_\_ Year Started \_\_\_\_\_  
Contact Name \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Contact Email \_\_\_\_\_ # of Members \_\_\_\_\_  
Meeting Location \_\_\_\_\_ Member Age Range \_\_\_\_\_

## Stock Study Information

Does the club use the Stock Selection Guide frequently? \_\_\_\_\_

Which software package does the club use to create the SSGs? \_\_\_\_\_

Where does the club get company data / information for analysis? \_\_\_\_\_

Describe the investment philosophy and goal of the club \_\_\_\_\_

Describe the decision making process of the club \_\_\_\_\_

## Stock Tune Up Information

### **Please Include:**

- Your most recent Club Accounting or Online Club Accounting portfolio printout or
- A copy of the current Stock Selection Guides
- Any information showing stocks held, purchase dates, purchase price, and number of shares held

If you do not have the above information in a club accounting program or do not have the original SSGs for the stocks, please complete the table of information on the next page, before returning it.

**Additional Stock Tune Up Information is continued on 2<sup>nd</sup> page**

