



SAMPLE OF INVITATION LETTER TO CLUB ORGANIZATIONAL MEETING

Date: **Wednesday, October 20, 200x**

Time: **7:00 PM**

Place: **Oakwood Library – Meeting room**

Topic: **Potential Start-up of an Investment Club**

Dear :

As we discussed a few days ago, a group of our friends are planning a “get-acquainted” meeting to discuss the idea of starting an investment club. You are invited to attend this informal meeting to discuss:

1. An overview of the pluses and minuses of an investment club
2. The types and amounts of work involved by investment club members
3. The club’s investing philosophy
4. The overall reasonable expectations of forming an investment club
5. The planning process for forming an investment club
6. Questions and answers session
7. Establish roster of club members

Please join us to see whether an investment club is right for you.

Refreshments will be served at the break.

See you on October 20th.

Sincerely,

John Smith, club organizer