

General Meeting Agenda (Sample)

Welcome members

Collect membership dues/contribution checks

Distribute Club Valuation Statements

Distribute Stock Study Reports, Copies of SSG and other materials

President Call Meeting to Order
Announcements

Club Secretary Report
Review and approve past meeting minutes
Record current meeting minutes

Treasurer Report
Update on current club financial information
Review current account/portfolio date totals (include dues collected today)
Update on brokerage account and checking account

Stock to Study Reports
Presentation of updated and new stock studies by club members
Review or discussion of stock study presentations
Update and review of stocks in portfolio

Club Member Voting Process
Club member motions on stock study presentations accepted
Vote on new stock study presentations for investment
Vote on investment of current club funds available to invest

Education Program (run by the vice-president)
Review questions from past lessons
Conduct educational lesson plan
Assign homework
Review local and national education programs available

Old Business
Review any club business, questions or information

New Business
Better Investing communication and information
Future needs or ideas of club; visitors scheduled, club needs

Assignments
Stocks to study, educational program homework

Adjournment
Announce time/date/place of next meeting