



Portfolio Tune-Up
“Investing the BI Way”

By Allen Holdsworth

Allen’s class will cover elements of the BetterInvesting (BI) Stock Selection Guide (SSG), including buying, selling and portfolio management. He will tie together all aspects of “Investing the BI Way!”

Prior to meeting with you online, Allen will review your entire portfolio and run an SSG for each of your stocks, using his judgment.

When Allen meets with you online, he will explain what he looks for in an SSG. He will point out items that he believes need to be monitored. He will discuss your portfolio and point out “red flags” on the stocks you own.

Diversification is critical, as you don’t want to “put all your eggs in one basket.” Allen will review your portfolio’s diversification by industry and size, and will point out which stocks are over-weighted.

Allen will suggest some alternate stocks for consideration. These new stocks may benefit the overall portfolio return.

The presentation will last from 40 to 60 minutes, depending on the discussion. The class will not end until all questions are answered.

Interested? Contact Kathleen Richards at Kathleen-richards@neo.rr.com

Cost: \$10 a person, \$100 minimum



Testimonials

“Don’t Fall in Love with Your Stocks!” was Allen’s advice. This helped us **CLEAN OUT THE DOGS** in our portfolio.”

...Robert, Profiteers Investment Club, Texas

“What Would Allen Do? is what we now ask when problems arise. That helps us **GET OUR PRIORITIES STRAIGHT!**”

...Betty, Win Investment Club, Alaska

“The **\$100 WAS WELL SPENT.** Allen’s insights were extremely helpful. It was definitely worth having his review.”

...Mike, New Westsiders Investment Club, Cleveland, OH

“Allen ran an analysis showing how increasing my position in certain holdings and selling off others would **IMPROVE MY RETURNS.**”

...Donna, Personal Portfolio, Cleveland, OH

“Our buying and selling **CONFIDENCE GREATLY INCREASED.** Allen’s workshop was truly a learning experience.”

...Mary, WOW Investment Club, Iowa



Allen Holdsworth

Biography

- Tuned-up over 90 portfolios.
- Rang the New York Stock Exchange Closing Bell in December of 2006.
- Member of BetterInvesting (BI) for 26 years
- Past President of the BI Volunteer Advisory Board (BIVA)
- Past Director for 11 years on the BIVA Board
- Member of an Investment club for 25 years
- Teaches a 16 week “Personal Investing” class at a community college.
- Teacher at 12 BI National Conferences (BINC)
- Broker and Financial Planner for 7 years.
- Retired for 8 years
- Graduate of University of Illinois
- Lives in Western Illinois, on the family farm
- Farmed for over 30 years.
- Professional Magician for 45 yrs.
- Model Train enthusiast
- Allen Holdsworth: aajje@frontiernet.net
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