

North Florida Chapter Communications
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CHAPTER NEWS

Summer 2023 Newsletter and Upcoming Events

NORTH FLORIDA CHAPTER ANNUAL MEETING (Robin Ware)

Join us Thursday evening, September 7 at 7:00 PM for the North Florida Chapter Annual meeting. We will discuss our FY2023 accomplishments, celebrate anniversaries for clubs that achieved amazing milestones, and we have a very popular BetterInvesting speaker lined up.

Christi Powell, from the Oklahoma Chapter, will share with us her advice on "Creating an Income Stream in Retirement." In her presentation Christi will transport us to the future where our investing focus shifts from a growth focus to conserving our investments.

Christi Powell is a Director with the Oklahoma Chapter since 2000 and also served on the BetterInvesting Volunteer Advisory Board. She is a well recognized national and regional speaker at many BetterInvesting events. As a Director with Washita Capital, a private equity firm, Christi is always willing to share her financial services industry knowledge with the BetterInvesting community.

Click on [Register for Annual Meeting](#) to reserve your seat at the webinar. We hope you will be able to join us.

CHAPTER SUPPORT FOR CLUBS AND MEMBERS (Jim Gallagher)

During 2023 the North Florida Chapter has volunteered hundreds of hours of support to our member clubs and individuals. We have visited 8 clubs during the year conducting portfolio reviews or conducting other training to meet club needs. Each week we host a Tuesday Training workshop that has amassed hundreds of regular attendees from clubs all over the Chapter as well as the Country. We hosted a local training event in Tampa attended by 23 chapter members. Our model club meets monthly every first Monday evening to provide an example to chapter clubs and individuals on applying the BI Investment Principles. The chapter is here to support our member clubs and individuals. If you need help with BI online tools or applying BI Investment Principles, reach out to us.

CLUB VISIT: 20 YEARS AND COUNTING (Dan Harter)

