

# 2021/22 Club Portfolio Tune-up!



## Why would your club consider a portfolio tune-up?

- Many clubs do not use the Stock Selection Guide (SSG) ....
- Many clubs are eager to learn – as a club – and will expand their education if given a little encouragement here and there...
- Using your holdings, learn portfolio management principles, sector diversification, and Better Investing principles for quality and value.

## What is the Club Portfolio Tune-up?

A review of BetterInvesting (BI) principles and guidelines for using the SSG to study each stock in your club’s portfolio. We share new and advanced topics for club consideration. One or two Chapter Directors will examine your portfolio and your stocks and will present the BI process that we go through when using the SSG. No investment recommendations are made.

## Why Do We Do It?

- To emphasize or re-emphasize the SSG!
- To foster club communication and outreach.
- To help clubs set and meet their portfolio goals.
- To give your club one or more tools for making better judgments in your arsenal.

## How Much Does It Cost?

- *If conducted by a Portland Director, the cost is \$50 if face-to-face (Covid 19 permitting) or \$25 if conducted online.*
- *If clubs/individuals wish to have Allen Holdsworth conduct an online portfolio review, the cost is \$50. See 2021 Education Event at: <https://www.betterinvesting.org/chapters/portland/news-articles>*

## What do we need from you?

Complete the request info below. We will call the Club Contact to schedule the Portfolio Tune-up.

- A valuation statement from *BIVIO* or *myIClub*’s club accounting program – **two weeks prior to the meeting.**
- **Face-to-face meetings:** Outlets for our PC on meeting day. A TV with a HDMI connector.
- **For online meetings:** We will need the email addresses of all your partners for 1 or more GoToWebinar invites. Partners need a PC or Mac with speakers and a mic.

## Request for a Club (Stock) Portfolio Tune-up!

Club Name \_\_\_\_\_ No. of Years \_\_\_\_\_

Club Contact Name \_\_\_\_\_ Phone No. \_\_\_\_\_

Club Contact Email \_\_\_\_\_ Number of members in Club \_\_\_\_\_

Club Meeting Day/Time \_\_\_\_\_

Potential Location \_\_\_\_\_ City \_\_\_\_\_

Check one: Our Treasurer uses  BIVIO  myIClub  Other \_\_\_\_\_

Contact: Bob Smith (**message phone 503-660-3247**) to schedule a Club Portfolio Tune-up or mail this form to: **BetterInvesting Portland Chapter**, 2870 NE Hogan Dr, Suite E, #155, Gresham, OR 97030 Attn: **Bob Smith**. 8/25/2021.