



**Online Chapter (OLC)**

*3rd*

**Annual Membership Meeting**

**August 25, 2022**

# Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced. The securities of companies referenced or featured in the seminar materials are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by BetterInvesting™ / National Association of Investors™. The views expressed are those of the instructors, commentators, guests and participants, as the case may be, and do not necessarily represent those of BetterInvesting™. Investors should conduct their own review and analysis of any company of interest before making an investment decision.
- Securities discussed may be held by the instructors in their own personal portfolios or in those of their clients. BetterInvesting presenters and volunteers are held to a strict code of conduct that precludes benefitting financially from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of BetterInvesting or the Director of Chapter Relations.
- This presentation may contain images of websites and products or services not endorsed by BetterInvesting. The presenter is not endorsing or promoting the use of these websites, products or services.
- **This session may be recorded for future use.**

# Program Agenda

## **7:30-8:30 PM EDT Business**

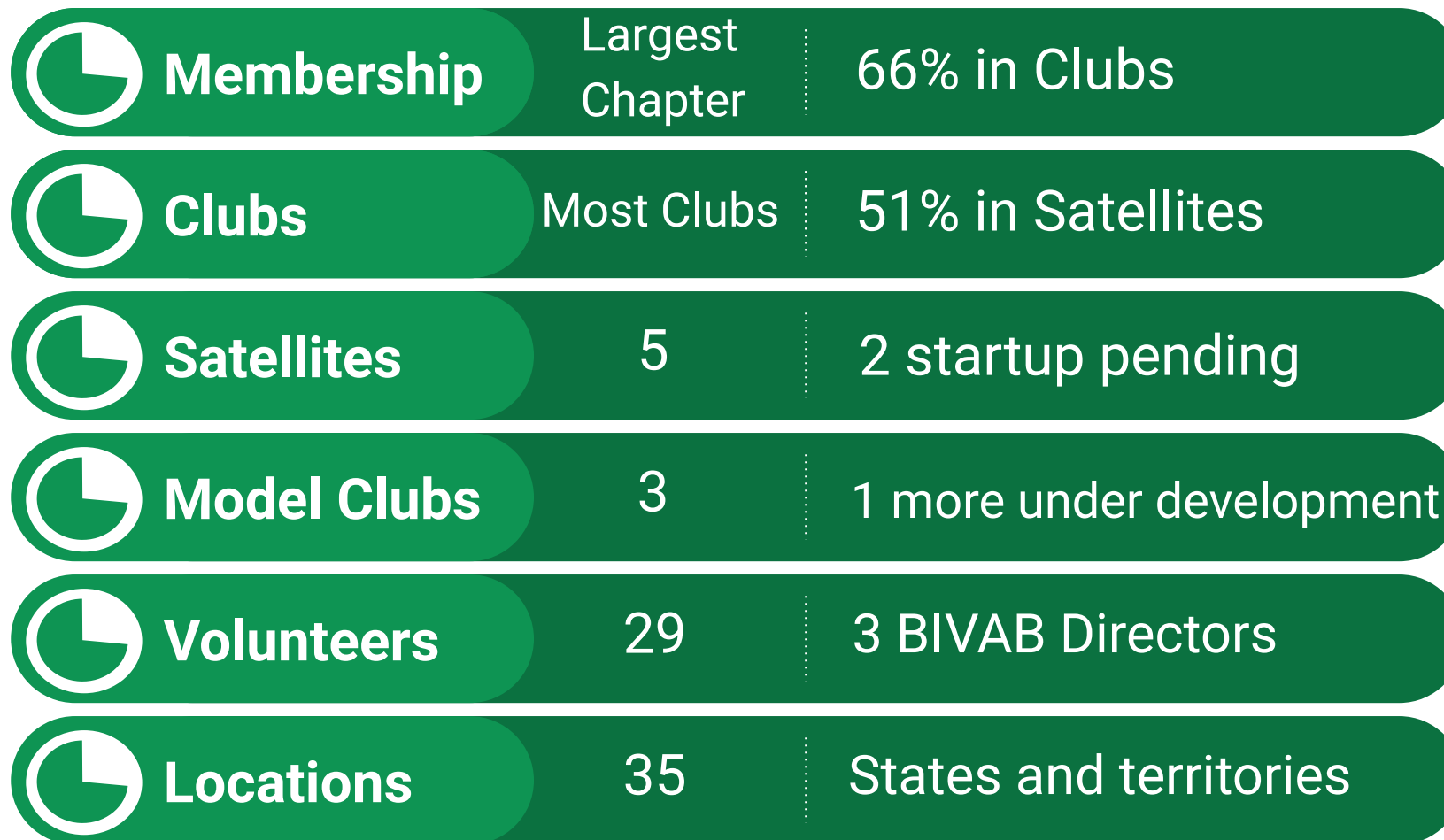
- Online Chapter Overview
- Accomplishments
- Satellites Overview
- Becoming a Volunteer
- Election of Directors
- Next Year Goals
- Online Chapter Portfolio Contest
- Q&A and Intermission

## **8:30-9:30 PM EDT BI National Education Event**

- Featuring Scott Horsburgh, CFA  
“Repair Shop: Behind the Scenes”

# Online Chapter Overview

# Online Chapter Quick Facts






# **This Year's Accomplishments**

# This Year's Accomplishments

<b>3 new satellites</b>	South Central Texas, Arkansas, Southwest Idaho
<b>A new program</b>	Hosted 4 interactive mentoring workshops
<b>Pilot portfolio challenge</b>	6 clubs participated
<b>Club visits</b>	Completed 7 club visits
<b>Educational event</b>	Hosted an educational event
<b>First Cuts</b>	Submitted 8 First Cuts to BetterInvesting
<b>Anniversary clubs</b>	51 anniversary clubs



# Anniversary Clubs

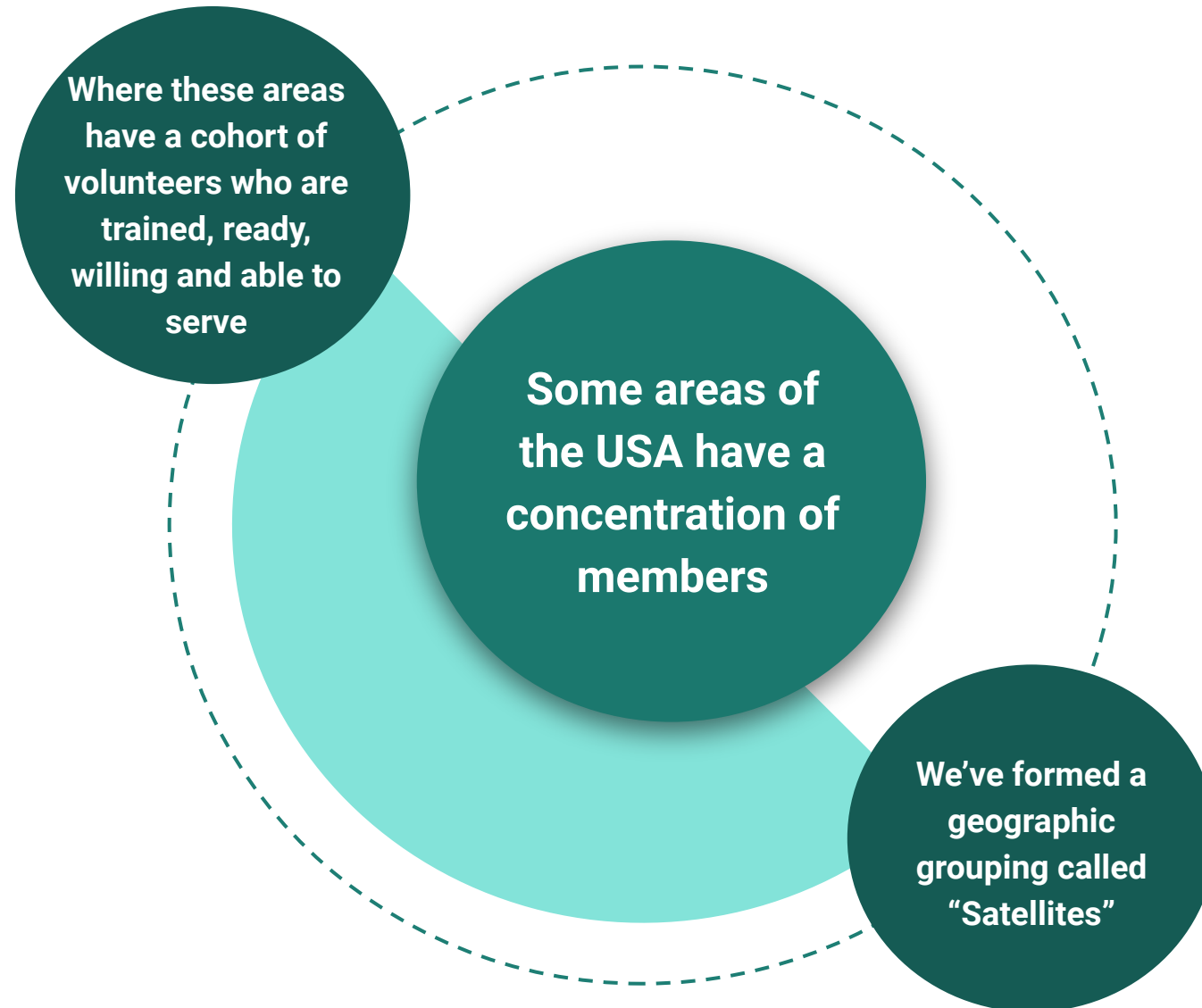


15 Years	1
20 Years	5
25 Years	26
30 Years	9

35 Years	4
40 Years	1
60 Years	1
65 Years	1

# Satellites Overview

# Satellites



# Satellite's Mission

Meet in-person in  
your local area



Provide education  
& training support  
for BetterInvesting  
members and  
clubs in the  
Satellite



Outreach activities within  
the local community

# Satellite Goals

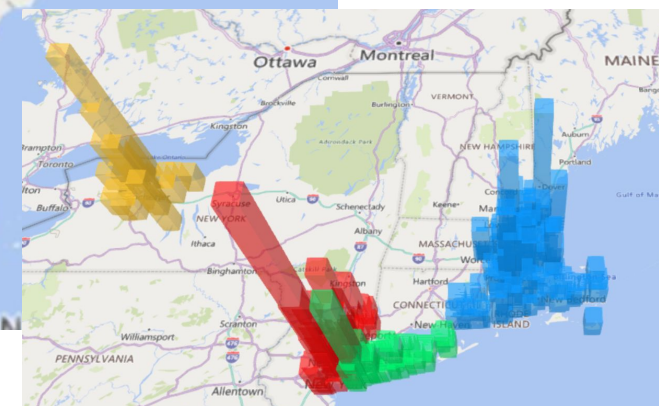
**To establish a core group of volunteers for each satellite**



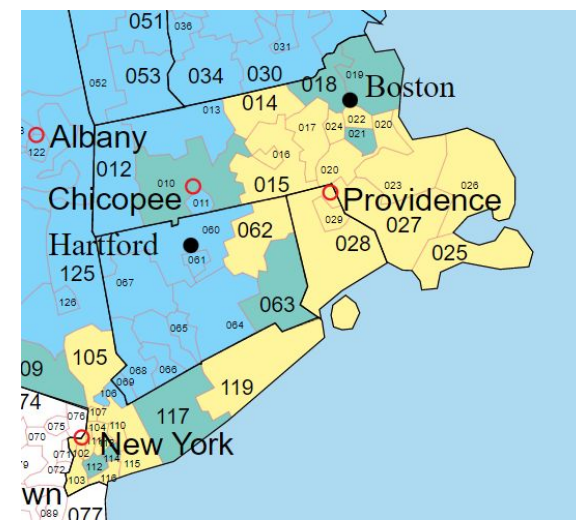
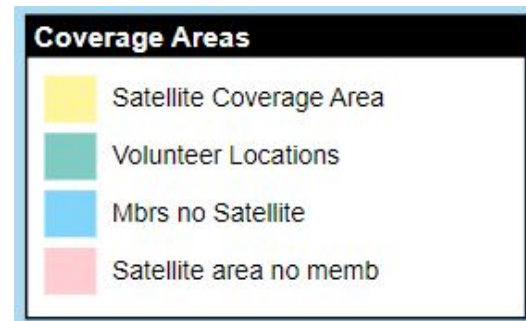
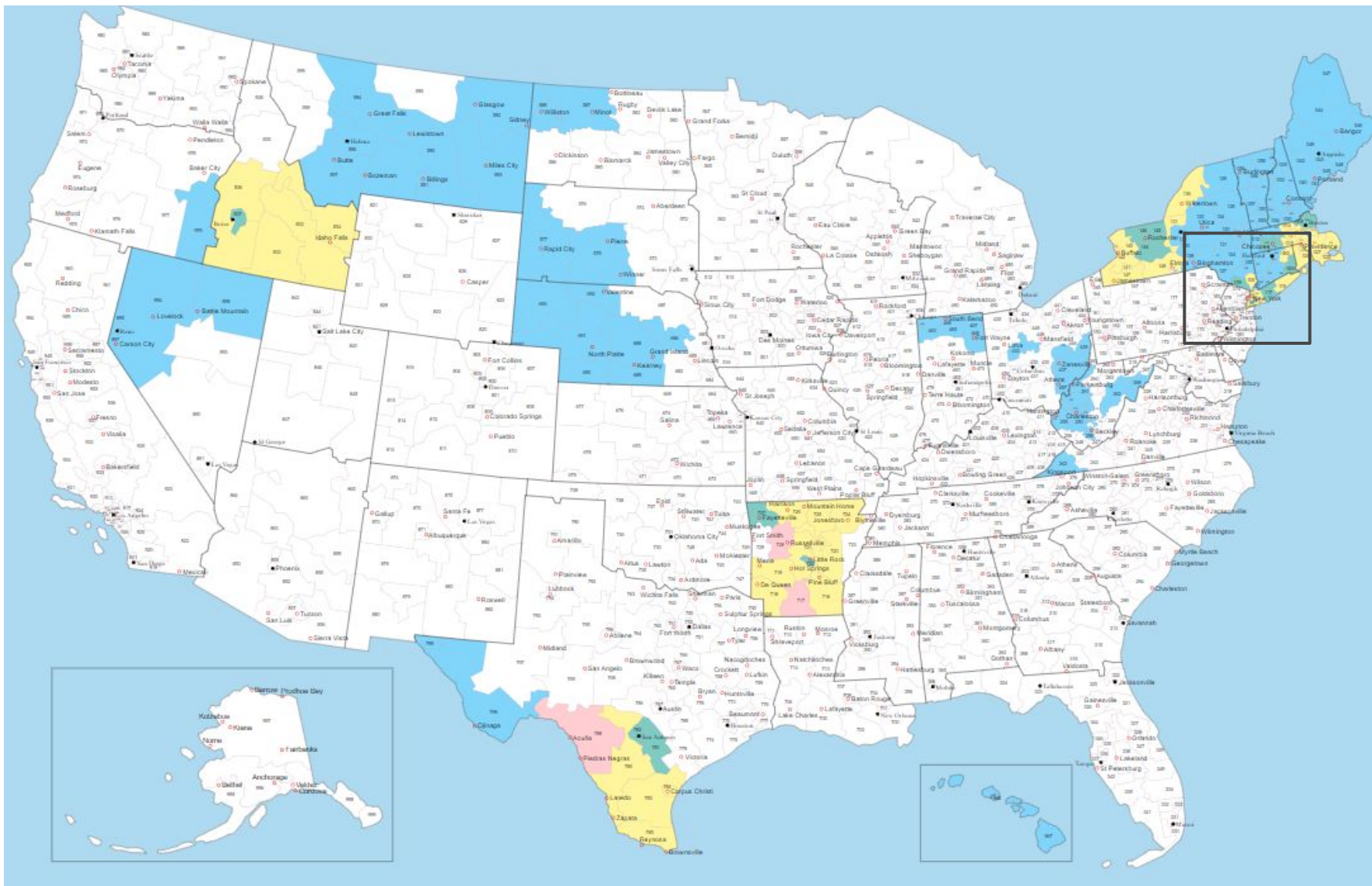
**Create a local BetterInvesting presence for our Online Chapter members**

**Support Satellite with education, training, planning, programs and funding**

# Where are the Satellites?



# U.S. Online Chapter Membership Coverage



# Being a Volunteer



**Harold Ackerman****Ila Barnes****Janet Blaser****Phil Crandall****Jie Eagleson****Ernie Felzani****Jack Finn****Jeff Fraser****Sharon Gaskill****Ira Haas****William Hawkins****Avi Horwitz****Linda Hunt****Herman Lebron****Patricia Leonard****Tom Loftus****Barney Lyons****Sriram Madabhushi****Thomas Martinka****Albert Molter Jr****Terry Monasterio****JoAnne Obata****Kevyn Robinson****Patti Singer****Philip Sudore****Ruth Thomas****Mike Vajdos****Robert Walker****Rosemary Weymouth****Richard Yurick**

# Becoming a Volunteer

01

**Volunteer**

A BetterInvesting member who wishes to contribute to the chapter education mission

02

**Associate  
Director**

A volunteer who wants to take on additional responsibility for programs and activities to gain experience to serve on the Chapter Board

03

**Director**

A volunteer who wants to be involved in the leadership and management of the Chapter Board

Submit your [volunteer application](#) to apply

# Election of Directors

# Current Chapter Directors

## Susanne Koster

- BI member since 1996
- Founder of Emanon Investment Club
- Served New York Chapter for 6 years
- Online Chapter Satellite Coordinator since 2020

Class of 2023

## Dan Perlman

- BI member since 1997
- Served as President North Carolina Chapter & Online Chapter
- National Volunteer since 2020

Class of 2023

## Chris McCarron

- BI member since 2017
- BI volunteer since 2020
- Online Chapter Education Committee Chair

Class of 2024

# BIVAB Directors

## Howard Johnson

- BI member and volunteer since 2000
- BIVAB director, chair of Club Support Committee
- George A. Nicholson Distinguished Service Award in Investment Education

Class of 2023

## Bob Houle

- BI member since 2007
- Volunteer since 2013
- BIVAB director
- President, Online Chapter

Class of 2024

## Jane Chatterjee

- BI member since 1992
- Volunteer since 1992
- BIVAB director, Chair of Chapter Support Committee

Class of 2025

# Election of Directors

## Avi Horwitz

- BI member and volunteer since 1997
- A board member of five chapters
- George A. Nicholson Distinguished Service Award in Investment Education

Class of 2023

## JoAnne Obata

- BI member since 2010
- BI volunteer since 2014
- Co-Founder of International Model Investment Club
- Online Chapter Technology chair

Class of 2024

## Ernie Felzani

- BI member since 1982
- BI volunteer since 1982
- President, Massachusetts Investment Club

Class of 2023

## Jie Eagleson

- BI member since 2013
- BI volunteer since 2015
- Co-Founder of International Model Investment Club

Class of 2025

## Ila Barnes

- BI member since 2000
- BI volunteer since 2002
- Online Chapter Secretary
- Leader, NYC Satellite

Class of 2024

## Sriram Madabhushi

- BI member since 2000
- BI volunteer since 2005
- Editor, Online Chapter Monthly Bulletin
- Leader, South Central Texas Satellite

Class of 2024

## Phil Sudore

- BI member since 1992
- BI volunteer since 1999
- Volunteer, Rochester Satellite
- Member, Online Chapter Education Committee

Class of 2025

## Jack Finn

- BI member since 2001
- BI volunteer since 2020
- Leader, Yankee Satellite

Class of 2025

# Nominations from the Floor

If you would like to nominate someone or yourself for a volunteer position, please enter it in the question box.



NOMINATIONS  
ARE OPEN

# Vote By Poll

Online Chapter members are eligible to vote





# Next Year's Goals

# Next Year's Goals

1

Continue providing educational seminars

2

More open forum mentoring workshops

3

More clubs to join visit-a-club for members to visit

4

Continue supporting model clubs

5

Encourage in-person satellite meetings

6

Establish First Cut training program

7

Increase club visits to support clubs and members

8

Inspire more volunteers

# Chapter Portfolio Contest

# Pilot Portfolio Contest

## Participants

Emanon Investment Club

Investors R Us

Let It Ride Investors of Carson Valley

Massaco Investment Club

PYMWYMI Investment Club

Yankee Model Investment Club

# 2nd Place

# Massaco Investment Club

Alphabet Inc Class C

Exxon Mobil Corp

D R Horton Inc

Crocs, Inc.

Marvell Technology Inc

# 1st Place Yankee Model Club

Meta Platforms Inc

ASML Holding NV

America's Car-Mart, Inc.

# Feedback and Discussion

- Allowed Individual Entrants
- Increased Number of Stocks
- Increased Value of Virtual Investment
- Allowed One Change in Holdings
- Asked to Provide Rationale for Stock Selections

# Enter the 2022 Portfolio Contest

- Each club or individual member allocates \$100,000 imaginary money
- Chooses 4-7 stocks
- Contest runs from September 1, 2022 - July 31, 2023
- Deadline of Submission: **August 31, 2022**
- Cash prizes if 8 Clubs participate



# How To Enter?

- Submit: [Online Contest Form](#)

**OR**

- Email to:  
[Contact@online.betterinvesting.net](mailto:Contact@online.betterinvesting.net)  
Subject: Portfolio Contest

**Submission Deadline: August 31, 2022**



# BetterInvesting National Education Event



**BIVAB President & Event Host  
Bobbie Kincaid**

# BetterInvesting National Education Event



Scott Horsburgh, CFA  
President, Provident Investment Management, Inc.  
Co-author, *Repair Shop*