

*BetterInvesting's™ Online Chapter
Monthly Bulletin*

July 2022

Volume 1, Issue 6

Four Things This Month

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| July Workshop | OLC Mentoring Workshop - July Preview |
| 23-26 June 2022 Recap | BetterInvesting™ 70th National Convention (BINC-2022) |
| 25 August 2022 | OLC Annual Membership Meeting: August 25, 2022 |
| Real-Time Results | OLC Annual Portfolio Contest 2022-2023 |
| Recurring Quick Access Links | |

OLC Webpage: [Online Chapter | Better Investing](#)

OLC at BINC 2022

OLC was well represented at the BINC 2022 with the third largest chapter contingent, after two Texas chapters! We were pleased that several of our board members were able to attend the conference in Dallas. It was a great opportunity to reconnect with our fellow BetterInvestors™ after a two year break. We all had a great time networking and did a lot of networking with the other chapter members. Jane, Susanne, Chris, Pat and Sriram were among those who attended. A highlight of our BINC experience was attending a workshop led by Susanne Koster and Kent de Jong. They provided a hands-on approach to Stock Selection and the overall investing process. It was well received and a great learning opportunity to those who attended and worked in teams for those three wonderful days.

Here is a [link](#) to some pictures Sriram Madabhushi took at the conference.

OLC Mentoring Workshop: July Program

Is July an odd month? The OLC's Education Committee has its open forum mentoring workshops on the 3rd Wednesday of every odd month. The meetings open with a quick presentation on a topic of interest and then the floor is open for anything you'd like to discuss. On July 20th at 8:30 pm (ET), the topic will be *Investor Therapy: Keeping Your Head in a Crazy Market*. Click this Zoom [Zoom link](#) to join the meeting.

Our last presentation in May featured Bob Adams from the Puget Sound Chapter. Bob is a wealth of information and shared his thoughts on everything from reinvesting dividends to hedging inflation. Be sure to check out the recording [here](#).

These meetings are getting great reviews from attendees! Mark your calendar. Our next two events are scheduled for July 20, 2022 and September 21, 2022. To enjoy these great sessions, just click on this [Zoom link](#) at the appointed hour. Details can be found on the [chapter's webpage](#).

Please join us so that we all can benefit from the shared wisdom and experience of the BetterInvestors™ members in the audience and the volunteers from the chapter.

Chris McCarron, [Membership Training & Education Chair](#)

OLC Annual Membership Meeting: August 25, 2022

Mark your calendars and be part of a great experience.

We will be holding our Online Chapter's Third Annual Membership Meeting on Thursday evening, August 25, 2022 from 8:00 PM to 9:30 PM EDT. Here is the [registration link](#) to reserve your seat.

While this is a chapter event, *all BetterInvesting* (BI) members and their guests are warmly welcomed to join us. You'll understand why in a moment.

Here's the program:

8:00 PM ET - Short Business Meeting - Election of chapter's leadership and celebrate Club Anniversaries.

8:30 PM ET: Keynote Speaker - Scott Horsburgh, CFA from Provident Investment Management will have a special program for us titled "Repair Shop: Behind the Scenes". You won't want to miss it!

9:15 PM ET: The *2022 Pilot Portfolio Contest Winner* will be announced along with the start of our *FY2023 Portfolio Challenge* that has some very interesting enhancements included, thanks to the insights provided from the pilot participants.

So, mark your calendars and be ready to enjoy this special night of celebration and education. Here again, is the [registration link](#) to reserve your seat.

OLC Pilot Portfolio Contest 2022 - Lessons Learned and Onward to 2022-2023 Contest

BetterInvesting's Online Chapter (OLC) Pilot Portfolio Contest ends July 31, 2022 and the 12 month-long, First Annual Portfolio Contest begins August 1, 2022. Overall, the *2022 Pilot Portfolio Contest* ran smoothly.

The entrants, their portfolios, and their standings can be viewed by clicking on [Club Summary](#) and [Club Details](#). Email your questions or suggestions to contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Below is a snapshot of current standings, as of 7/10/2022.

| Club | Starting Value | Portfolio Value 7/10/2022 |
|---------------------------------|--------------------|------------------------------|
| Yankee Model Investment Club | \$10,000.00 | \$8,438.96 |
| Jack Long* | \$10,000.00 | \$7,936.94 |
| TESTrch | \$10,000.00 | \$7,439.98 |
| Let It Ride Investors of Carson | \$10,000.00 | \$7,784.67 |
| PYMWYMI Investment Club | \$10,000.00 | \$8,221.34 |
| Massaco Investment Club | \$10,000.00 | \$8,295.87 |
| Investors R Us | \$10,000.00 | \$8,268.37 |
| Emanon Investment Club | \$10,000.00 | \$6,373.77 |
| Total | \$80,000.00 | \$62,759.90 |

* The TESTrch & Jack Long portfolios were test entries and not eligible, will only be tracked.

MOVING ONWARD TO NEW CHALLENGES

Based on having the Pilot Contest and holding a discussion forum open to all OLC members in May, we have learned from the experience and made member-suggested changes in the rules. Compared to the *Pilot Contest*, new features of our first annual *FY2023 Portfolio Contest* are:

- besides clubs, individuals can now enter the contest,
- the imaginary sum invested has been increased from \$10,000 to \$100,000,
- the number of stocks in the portfolio has been increased from 3-5 to 4-7,
- entrants are being asked, but not required, to provide SSGs and indicate the rationale behind their selection of stocks,
- once during the year contestants will be able to change holdings in their portfolio.

To enter the *FY2023 Portfolio Contest* you need to act now ... on or before July 31, 2022 ... by completing [this entry form](#) or submitting the necessary information to contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Please do enter—it can be informative, engaging, and simply fun!

Dan Perlman, [Portfolio Contest Chair](#)

BetterInvesting Weekly - Your Portal to the BI World !!

BetterInvesting Weekly is a member-exclusive, one-stop, weekly e-newsletter emailed to every BI member on Thursday evenings. It highlights national online education event announcements, First Cut Stock Reports, stock ideas, educational content, online tool notifications, community news, and information, useful tips, and quotes to help you get the most from your membership. *BetterInvesting Weekly* is included with membership and is a must-read for all members.

This information-packed e-newsletter benefits all members by becoming the key resource to rely on for current, relevant, and important information about membership issues. Communicating with us this way allows BI to consolidate their email campaigns, and help to greatly reduce the number of emails being sent to our inboxes.

If you're not getting *BetterInvesting Weekly* it most likely is because you have not elected to receive it. To get on the mailing list log into your BI membership page and navigate to the 'My Account' page on the BetterInvesting member website. Under 'My Account' you'll need to go to '[Email and Product Subscription Information](#)'. To subscribe, all that's needed is to check the box next to 'BetterInvesting Weekly'.

Recurring "Quick Access Links"

BetterInvesting™ National News

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BI emails all members a bulletin listing national webinar registrations, StockUps, TickerTalks, First Cut Stock Reports and more. You don't want to miss it!

If you are not receiving your *BI Weekly*, go to your [BI member profile](#) and update your *Email and Product Subscription Information* selections to let BI you would like to routinely receive.

BetterInvesting™ Model Stock Investment Clubs

BetterInvesting™ now has grown to 54 model clubs throughout the United States that you may want to visit. To help you find them, we have curated a list of active model clubs in all the BetterInvesting™ chapters that you may be interested in visiting. To find out when and where, click on this [curated list](#). Please report corrections to the [OLC President](#) and let us know how this directory can be made more useful for you.

How to Schedule a Club Support Visit

Even if your club is not celebrating a five-year Anniversary this year, don't despair. We have reserved some calendar time for your club to receive a support visit from one of our club support *tiger teams*. With almost 400 stock investment clubs in the Online Chapter we can't, of course, visit all of our clubs each year. But we can support *you*, particularly if you have some training needs you need help with. If your club would like to benefit from one of the remaining eight open club visit time slots, all you have to do is let us know. For more details or information or questions please email us at club_support@online.betterinvesting.net

As always, we value your constructive feedback on how this monthly communication to all our chapter's members can be made even more useful to you. Please let the editor know at contact@online.betterinvesting.net. As you can see, we are listening to you.

