



# CHAPTER EVENT

## Summer Newsletter Help Us Name Our Newsletter

We want to provide news and assistance to Philadelphia area members and friends. Help us select a Newsletter Name that will speak to our area and convey our mission. Selected entry wins a free year's membership to BetterInvesting [directors and volunteers not eligible]. Submit suggested newsletter name to [contact@philly.betterinvesting.net](mailto:contact@philly.betterinvesting.net)

### Congratulations *To* the Philadelphia Area Chapter Anniversary Clubs

<b>Hobo Associates Investment club</b>	<b>60</b>
<b>Years</b>	
<b>I &amp; P Associates Investment Club</b>	<b>50</b>
<b>Years</b>	
<b>ARC Investment Club</b>	<b>35</b>
<b>Years</b>	
<b>Brookwood Investment Club</b>	<b>35</b>
<b>Years</b>	
<b>Maya Investment Club</b>	<b>30</b>
<b>Years</b>	
<b>Class Act Investment Club</b>	<b>25</b>
<b>Years</b>	
<b>Covington Ladies Investment Club</b>	<b>25</b>
<b>Years</b>	
<b>Fun\$ Investment Club</b>	<b>25</b>
<b>Years</b>	
<b>Winners Circle Investment Club-Women</b>	<b>25</b>
<b>Years</b>	
<b>Relative Assets Investment Club</b>	<b>20</b>
<b>Years</b>	
<b>Union League of Phila. Investment Club#3</b>	<b>15</b>
<b>Years</b>	

## Events, Classes, and Webinars

**Thursday, September 9, 2021** Cost: Free Time: 7pm-830pm

**Title:** The Philadelphia Area Chapter Annual Meeting

This is a live meeting being held at the Community Room at The Giant in Willow Grove. Members of BetterInvesting have an opportunity to meet the members of the Chapter Board of Directors and vote to elect new directors for the upcoming 2021-2022 year. The meeting will also be available by GTM and the link to log on is:

<https://global.gotomeeting.com/join/137097781>

**Tuesday, September 14, 2021** Cost: Free Time: 7pm-8pm

**Title:** Current State of the Equity Market

**Synopsis:** We will review the current state of the equity market using the S&P 500 as the market measure. We will look at:

- Underlying macroeconomic factors including the impact of government actions
  - Corporate earnings and fundamental measures of the market
  - Market and Technical issues and
  - Market Sectors that do well in the current recovery/growth phase.

**Brief Bio** - Dr. Rajeev Vaidya is a retired senior executive for a Fortune 100 company who has been doing pro-bono work on investor education for over 2 decades. He is a director in the Philadelphia chapter of BetterInvesting.

**To register for the free webinar:**

<https://attendee.gotowebinar.com/register/3487111435712931088>

**Saturday, November 6, 2021** Cost: \$15 Time: 9am-3pm

**Location:** Giant Community Room, Willow Grove, PA

**Title:** Fundamental Analysis of Companies using the Stock Selection Guide.

**Synopsis:** Learning and applying fundamental analysis of stocks for fun and profit

**Pay by Eventbrite:** <https://www.eventbrite.com/e/fundamental-analysis-using-the-stock-selection-guide-tickets-165986146031>

**Pay by check:** Make check payable to **Philadelphia Area Chapter of BI** and mail check to Gloria Mankonen at 1106 Cowpath Rd., Hatfield, PA

**Saturday, December 4, 2021**      **Cost: \$30**      **Time: 9am-4pm**

**Location: Giant Community Room, Willow Grove, PA**

**Title: What's on the Investing Horizon for 2022**

**Presenter: Doug Gerlach, President of ICLUB**

### **Part 1. Investing in the New Normal Post-Pandemic Economy**

Without a doubt, the COVID-19 pandemic disrupted the businesses of many companies worldwide, sometimes for the better, and sometimes for the worse. Big shifts were seen in consumer purchasing behavior, real estate trends, and the employment market. While 2021 brought a respite from the most severe aspects of the pandemic, will the recovery continue in 2022? Will the changes experienced in 2020 and 2021 for many companies and industries remain in force? And what are the best opportunities for stock investors in the "new normal" economy?

### **Part 2. Investing in Stocks that Don't Fit the BetterInvesting Model**

BetterInvesting's stock analysis methodology offers the advantages of a disciplined approach to investing that can be implemented successfully by any investor or investment club. But what about all the stocks that seem to always be rising in price but "don't look good" on the Stock Selection Guide? You wouldn't hammer a nail with a screwdriver, so you need to have the right tool for the right job. If you want to invest in stocks that don't fit the BetterInvesting model, here are the things you should consider.

**Part 3. Portfolio Reviews.** Doug will be sharing portfolio reviews for selected clubs who submit their portfolio excel document for Doug to review. Contact Gloria Mankonen for format and address. [contact@philly.betterinvesting.net](mailto:contact@philly.betterinvesting.net)

**Part 4. 2021 Club Tax Review**– Doug to review any changes and updates on 2021 taxes to help clubs with filing the 2021 taxes.

**Pay by Eventbrite: Registration accepted starting August 3, 2021**

<https://www.eventbrite.com/o/philadelphia-area-chapter-of-betterinvesting-16789819756>

**Pay by check: Make check payable to Philadelphia Area of BI**

**Mail to:** Gloria Mankonen  
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