

# BetterInvesting's™ Online Chapter Monthly Bulletin

June 2022

Volume 1, Issue 5

## Five Things This Month

May recap	<a href="#">OLC Mentoring Workshop - Recap of Bob Adam's presentation</a>
23-26 June 2022	<a href="#">BetterInvesting™ 70th National Convention (BINC-2022)</a>
Right Now !!	<a href="#">Portfolio Tuneup Anyone?</a>
25 August 2022	<a href="#">OLC Annual Membership Meeting: August 25, 2022</a>
Real-Time Results	<a href="#">OLC Pilot Portfolio Contest 2022 Update</a>
<a href="#">Recurring Quick Access Links</a>	

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

## President's Message

Welcome to the Online Chapter's June *Monthly Bulletin* everyone! We are continuing to make improvements to this *Monthly Bulletin* based on your constructive and insightful feedback to us at [contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net). Our goal is to provide you timely information on things we think *you* need to know, that's why we appreciate so much your comments on how we can improve our service to you. Please keep your comments coming.

This month's bulletin has a common theme: the BetterInvesting™ website and our chapter's web page on the BI website. You want real time information on the portfolio contest? A recording of last month's Education Committee *Open Form*? Upcoming events you don't want to miss? It's all on the [chapter's web page](#). But don't stop there, explore the full [BI website](#) and discover all the great things we have there to support you on your journey to financial security and independence. We have a very special treat for you in this bulletin ... a personal guided tour by BI's CEO, Ken Zendel of the BI

website (courtesy of our sister Alabama/Emerald Coast Chapter). You don't want to miss viewing that recording since what you don't know may be just what you need to know to make the most out of your BI membership.

Enjoy this month's bulletin and keep your suggestions coming ... continuous improvement is our mantra.

## OLC Mentoring Workshop: May Program Recap

On May 18th at 8:30 pm (EDT), [Bob Adams](#) shared his excellent presentation, [Basic Rules—Investing for a Lifetime](#). Bob Adam is a nationally acclaimed BI speaker and is from the Puget Sound Chapter. Bob is retired from 26 years in radio & television broadcasting, and 13 years as a college professor.

After Bob's presentation, the floor was open to questions on any investment-related topic. 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 open forum meetings are held on the 3rd Wednesday of every odd month at 8:30 PM ET. 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: Year in review and plans for next year. 2022 Portfolio Contest Winner Announcement

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.

## Portfolio Tuneup Anyone?

Do you love the “Repair Shop” articles in the BI magazine by Scott Horsburgh? If you do, consider sending submitting your club’s portfolio. It just may be accepted for a future article...or it may be featured in his future presentations at BINC. We encourage you take advantage of this unique opportunity to have an expert take a dispassionate look at your holdings.

Here are the instructions from Scott:

*We need a portfolio statement including acquisition dates if possible; that helps us understand the environment in which a purchase decision was made.*

*It is highly recommended to include a narrative about club history, investment philosophy, and methodology.*

*The last request is to make someone available for follow-up questions; Dan and I typically request about 30 minutes of time on the phone for clarifications. The magazine likes to print pictures of clubs. Everything goes to Jan Jeffres at BI - [janj@betterinvesting.org](mailto:janj@betterinvesting.org).*

*I'm looking forward to seeing submissions from clubs in the Online Chapter!*

*Scott D. Horsburgh, CFA*

## OLC Pilot Portfolio Contest 2022 - “current” status

Development 1: You are invited to a Focus Group discussion of lessons learned from the Pilot Contest and the best practices for the Online first annual portfolio contest. It will be at 8:30 pm ET one evening Monday to Thursday, June 13-16. For more details contact [D\\_perlma@uncg.edu](mailto:D_perlma@uncg.edu).

Development 2: Following the June 23<sup>rd</sup> OLC Directors meeting, final rules for the first annual portfolio contest will be announced. Currently entrants select three to five stocks, allocating \$10,000 among them. Plan for your club to submit an entry, due by the end of July, 2022.

The combined value of the eight portfolios we are tracking increased in May, up from \$68,635.35 to \$69,738.49. BI portfolios gained 1.6% versus the S & P's loss of 0.64%. The rankings were moderately stable, with the Yankee Club again moving into the top position helped by a 31 percent increase in America's Car Mart during May.

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

Be watching for a future workshop notice inviting club representatives to collaborate with the chapter's portfolio committee to develop rules for the contest that better reflect BetterInvesting's™ philosophy and investing strategy.

Dan Perlman, [Portfolio Contest Chair](#)

## Portfolio Contest Standing as of 6/1/2022

Club	Starting Value	Portfolio Value 6/1/2022
Yankee Model Investment Clu	\$10,000.00	\$9,784.81
Jack Long*	\$10,000.00	\$9,100.70
TESTrch	\$10,000.00	\$8,778.25
Let It Ride Investors of Carson	\$10,000.00	\$8,726.41
PYMWYMI Investment Club	\$10,000.00	\$8,703.56
Massaco Investment Club	\$10,000.00	\$8,644.96
Investors R Us	\$10,000.00	\$8,550.71
Emanon Investment Club	\$10,000.00	\$7,494.08
Total	\$80,000.00	\$69,783.48

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

### A Tour of the BetterInvesting™ Website by BI's CEO Ken Zindel

With chapter members drawn from all over the country and overseas our chapter has a very diverse audience for the support programs our volunteers provide to the membership. The common denominator we share is we are all supported through our BetterInvesting (BI) website and our chapter's web page on the BI website. Confusing? Don't know what's where? Or who does what for us? Perhaps a comprehensive, personal tour by our own CEO, Ken Zindel is what we need.

Please take a moment (actually, 39 minutes, 22 seconds!) and join Ken as he shares with us all the great things things you need to know to fully benefit from what your BI membership provides you. Just click the [recording link](#), sit back, and discover a whole new world designed to help you become a better investor.

### 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'.

## BINC Registration - June 15, 2022 - DEADLINE fast approaching

BINC is back and we're looking forward to you joining us in Dallas for our 70<sup>th</sup> birthday. The convention runs from the 23<sup>rd</sup> through the 26<sup>th</sup> of June. After a two year hiatus we are all ready to get together again and take that next step up in our investor education. Registrations are being accepted through 17th of June.

The Online Chapter will host a small reception at BINC for all Online Chapter Members. Susanne Koster has sent an invitation for Friday, June 24 at 5:30 PM in the Benbrook Room. Please join us.

Don't miss out on the party. Register today before the window closes [www.betterinvesting.org/binc](http://www.betterinvesting.org/binc).

## 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™ currently has 46 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

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](mailto:club_support@online.betterinvesting.net)

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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](mailto:contact@online.betterinvesting.net). As you can see, we are listening to you.

June 2022

*Editor: Sriram Madabhushi*

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