

Congratulation 2026 Certificate Clubs



45 Year Club

High Hopes Investors Club



40 Year Club

Women Investing Now – WIN Investment Club

35 Year Club

Redwood Growth Investment Club

30 Year Clubs

Two Bit Trading Club

Gold Horizon Investments

Conservative Investors Club

Peninsula Investment Group

Women Investing Now Club - WINC

20 Year Club

The Bomb Investment Club

15 Year Club

San Francisco Bay Area Model Club



These Clubs are from all over our region:

*Walnut Creek, Livermore, Piedmont, Pleasanton, Martinez, San Rafael,
Napa, Berkeley, Richmond, Redwood Valley*



Resources for Members

2026 SF Bay Area Chapter Investor Education Day

SF Chapter Directors

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Content

- Local Resources

- SF Board of Directors
- Local classes
- Club visits
- SF Model Club

- National Resources – Education and stock ideas

- Video library
- First Cut Reports
- SSG Stock Search Engine
- Club Connect – [Looking for a club/Club looking for members](#)

- Summary

www.betterinvesting.org/chapters/san-francisco-bay-area

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San Francisco Bay Area Chapter

Local Events

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Model Investment Club

Visit-A-Club

Investment Club Support

News & Articles

Volunteering



The San Francisco Bay Area Chapter of BetterInvesting welcomes you as a member of BetterInvesting. As a member of BetterInvesting you are automatically a member of your local BI chapter, at no extra cost!

The San Francisco Bay Area Chapter serves San Francisco, Oakland, Walnut Creek, San Mateo, San Rafael, Santa Rosa, Napa, Vallejo, Eureka, Menlo Park, Napa and Pleasanton. We are chartered by the National Board of BetterInvesting and staffed with volunteers, responsible for carrying out the mission of BetterInvesting; to provide investment education for local investors, help them learn the BetterInvesting investment principles and tools as well as assist investment clubs with management and accounting. We accomplish this goal with investment educational seminars, workshops, and club visits. [Click here](#) for more information.

Our Chapter's mission is to educate, mentor and support all investors: individual members, investment club members, and potential investors using BetterInvesting principles. The Chapter offers classes and special events on topics from investment basics to club accounting. You can always find the most current information about our activities by clicking on [Local Events](#).

*SF Directors – 7 Volunteers
Local classes – in-person and virtual
Club visits – let us come visit your club!*



Welcome Two New Board Directors

•Debra Valentine



•Serina Kwok

Looking forward to working with you!

Congratulations Kweli Lewis

on winning the 2026 Thomas O'Hara Award



Thank You For Your Service

SF Model Club

- Currently 13 members. Though 1 person is in the process of leaving the Club.
- Wide spectrum of experience and backgrounds among members.
- Meets the second Thursday of every month.
- We meet virtually for all meetings and on occasion in-person.
- Started in 2011.

San Francisco Model Club Portfolio – 6/10/2026

	Shares Held	Cost Basis per Share	Total Cost Basis	Price per Share	Market Value	Unrealized Gain/(Loss)	Percent of Total
Amazon.com Inc (AMZN)	26.0000	212.6692	5,529.40	238.0000	6,188.00	658.60	5.9%
Apple Inc (AAPL)	31.0000	37.7554	1,170.42	291.5800	9,038.99	7,868.57	8.7%
Asml Holding Drc (ASML)	8.0000	711.5525	5,692.42	1,734.1900	13,873.52	8,181.10	13.3%
Charles Schwab Corp (SCHW)	85.0000	51.6647	4,391.50	89.2700	7,587.95	3,196.45	7.3%
Intuit Inc (INTU)	6.0000	418.4400	2,510.64	284.2200	1,705.32	(805.32)	1.6%
Intuitive Surgical Inc (ISRG)	15.0000	102.9540	1,544.31	412.0200	6,180.30	4,635.99	5.9%
Markel Group Inc (MKL)	4.0000	1,374.5975	5,498.39	1,820.9400	7,283.76	1,785.37	7.0%
Miller Industries Inc (MLR)	100.0000	35.7958	3,579.58	47.8000	4,780.00	1,200.42	4.6%
Netflix Inc (NFLX)	24.0000	98.5079	2,364.19	82.0000	1,968.00	(396.19)	1.9%
Nvidia Corp (NVDA)	48.0000	121.8100	5,846.88	200.4200	9,620.16	3,773.28	9.2%
Paycom Software Inc (PAYC)	24.0000	167.4708	4,019.30	136.7200	3,281.28	(738.02)	3.1%
Ross Stores (ROST)	37.0000	130.8800	4,842.56	231.9200	8,581.04	3,738.48	8.2%
Ulta Beauty Inc (ULTA)	14.0000	352.9286	4,941.00	470.7500	6,590.50	1,649.50	6.3%
VISA Inc (V)	25.0000	166.0927	4,152.31	322.9600	8,073.99	3,921.68	7.7%
Vertex Pharmaceutical (VRTX)	20.0000	279.0975	5,581.95	435.7100	8,714.20	3,132.25	8.3%
			61,664.85		103,467.01	41,802.16	99.2%

Cash Account	Total Cost Basis	Market Value	Unrealized Gain/(Loss)	Percent of Total
ETrade Securities LLC	832.33	832.33	0.00	0.8%
	832.33	832.33	0.00	0.8%
Total Securities and Cash Accounts	62,497.18	104,299.34	41,802.16	100.0%

Total Number of Valuation Units to Date 2,379.022462
 Value of One Unit \$ 43.841259



National Resources

- BetterInvesting Magazine
- Over 100 Investment Education Videos
 - Ticker Talk and their bite-sized discussions
 - Stock Up webinars on investment topics
- First Cut Stock Reports
- SSG Stock Search Engine Tools
- Many sources of stock ideas
- Highly awarded investment newsletters

National Resources



HOME

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Don't have access? Free, limited trial version



First Cut Stock Reports

Every week, BetterInvesting members from across the country share new stock studies.

VIEW ALL

Most Active Stocks

The top 10 companies our members are investing in (ranked by combined buys and sells) are:

	Buy/Sell
1. NVIDIA (NVDA)	170-79
2. Microsoft (MSFT)	144-27
3. Amazon.com (AMZN)	83-48
4. Apple (AAPL)	53-74
5. Netflix (NFLX)	86-23



Investment Club Connect

For clubs to find like-minded members who are interested in joining an investment club and vice versa.

Find a Match →



Club Forum

Investment club operations topics for myICLUB and BetterInvesting members.

Visit the Forum →

Upcoming Events



Video Learning Library

Stock Selection Programs

Video series that explore all aspects of stock selection and the Stock Selection Guide (SSG).



Regularly Scheduled Programs

Regular programs that our members love.

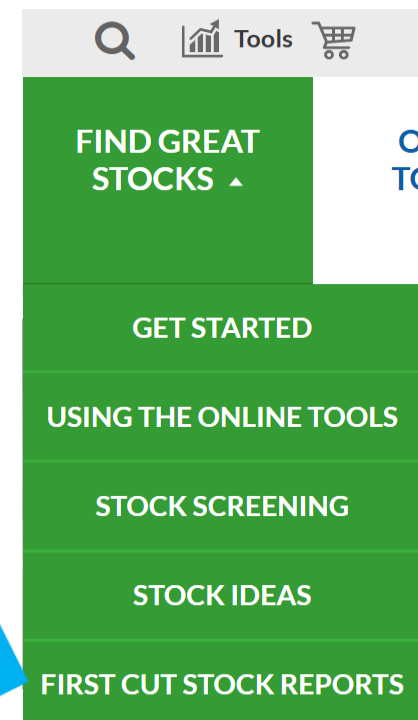


First Cut Stock Reports

First Cut Stock Reports are created by BetterInvesting members on good quality companies. These stock reports consist of a completed Stock Selection Guide (SSG) showing the judgments made by the author, and a written report sharing why each judgment was made. Use these reports to find potential investments and to compare your SSG with others from our community of investors.

The First Cut Stock Report template (DOCX) is an easy-to-use form providing a simple format to capture your rationale and thoughts about your completed SSG. Complete instructions to submit a First Cut Stock Report are included in the template.

[DOWNLOAD FIRST CUT STOCK REPORT TEMPLATE](#)



SSGPlus Stock Search Engine Tools

Online Tools

Launch SSG - Enter Ticker Here GO

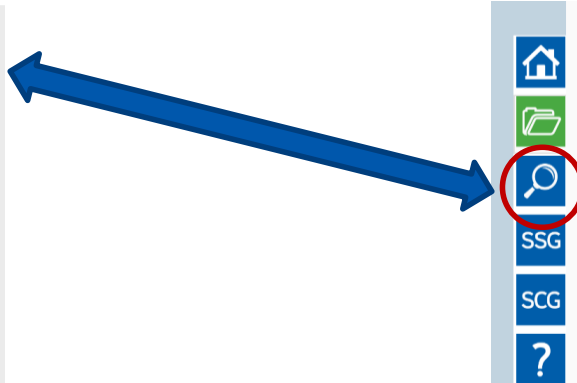
My Studies

Don't have access? Free, limited trial version

SCG

CR

?



BETTER INVESTING
SSG PLUS

Portfolios and Studies

New Study

Portfolios

Show 10 entries

Actions

Stock Ideas - Search for a Company

Search Criteria

9 Yr Sales Growth (%):

9 Yr Earnings Growth (%):

5 Yr EPS R-squared:

Size:

Sector:

Dividend Yield (%):

Pre-Tax Profit Trend:

Return on Equity Trend:

Morningstar Growth Grade:

Morningstar Profit. Grade:

Morningstar Financial Health:

PE / Historical EPS Growth:

Traded Exchange:

Predefined Screens

?

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?

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Looking for more in-depth screening? Check out MyStockProspector.com

MyStockProspector

Filtered List

?

Ticker Heat Map

Technology				
AAPL	MSFT	ADBE	AMD	ANET
		ASML	AVGO	ENPH
		SWKS	CSCO	CRWD
NVDA	FTNT	TSM	PANW	MPWR
		CLFD	QCOM	INTC
Healthcare				
RMD	UNH	NVO	CRL	ABBV
		ADUS	EW	PFE
		CVS	VEEV	MRK
INMD	MEDP	LLY	JNJ	ABT
			MDT	ZTS
				SYK

A resource of stock ideas based on the top 100 studies created by members in the last 90 days.

Investment Club Connect – New!!!

[Home](#) > [Members](#) > [Investment Clubs](#) > Investment Club Connect

Introducing a New Era of Camaraderie: Investment Club Connect

Investment Club *Connect*

With Investment Club Connect, it's now easier than ever for clubs to find like-minded members who are interested in joining an investment club.

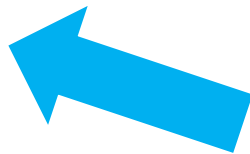
Investment Club Connect is an exciting program designed to help individuals and investment clubs connect seamlessly. Many individuals have expressed a desire to join existing investment clubs, while clubs have struggled to find new members when someone leaves.

Here's how it works:

1. Individual members express their interest in joining a club, and we maintain a confidential list of these individuals, along with clubs open to adding new members.
2. Our custom matching technology considers factors like gender, distance, and other preferences to present individual member information to existing clubs.
3. Clubs can then decide whether they wish to connect with a prospective new member, and if interested, they can reach out directly.
4. There's no obligation for either party – think of it as investment club dating!
5. Best of all, this service is entirely free for BetterInvesting members!



[REGISTER YOUR CLUB WITH INVESTMENT CLUB CONNECT](#) [GET MATCHED WITH A CLUB](#)



Questions? [View the FAQ \(PDF\)](#)

Summary

- There are lots of learning resources and videos for investors.
- Consider Club Connect to find new members.
- See how BI members are investing with First Cut and the SSG Plus Search Engine.
- Join your volunteer Board and expand your investment knowledge.
- Thank you Kweli.

Question or Comments?

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Spread the Word

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www.betterinvesting.org/freetrial



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