



NATIONAL ASSOCIATION OF INVESTORS CORPORATION

BETTERINVESTING™

Wisconsin Chapter

August 2026

Co-Ed Investors Club Marks 40 Years

During their regular in-person meeting this past June, members of the Co-Ed Investors Club of Green Bay were presented with a 40th Anniversary Certificate by Don Maurer, volunteer director with the WI Chapter of BetterInvesting. They also received an overview of the BetterInvesting website and the SSG Plus tool.

The club, founded in late 1985, has 13 members, five of whom have belonged for more than 30 years. Members are expected to attend a majority of meetings, which include approval of the previous month's minutes, a treasurer's report, a portfolio review, and discussions of potential stock purchases and sales.

The club relies on SSG Plus tools for stock selection and continues to refine its investment approach. Over time, it has eliminated DRIPS, uses limit orders occasionally, and adopted a policy of staying fully invested. The group's goal is a 15% rate of return, and it has bested the S&P 500 by at least 1.5% over the last 3- and 10-year periods. It now has a million-dollar portfolio, which is buoyed by technology holdings that include Apple and Nvidia.



(Front row) Karen Skaletski,
Jay Robitshek

(Back row L-R) Dawn
McCullough, Rae Marie
Gibson, Walter Hecker, Linda
Kananen, Victoria Perron,
Mark Hultman, Janet Brehm,
and Todd Hermans

Free Stock-Scoring Tool now Live on BI website

In advance of its full launch, RightStock is now being offered free on a trial basis for BI members.

The new tool is built on BetterInvesting's methodology and provides two scores — the Fit Score and the Opportunity Score — to help users quickly assess whether a company appears to have the characteristics that BetterInvesting looks for.

RightStock has no buy or sell signals, and no methodology is required to use it. Anyone can score a company in about 30 seconds.

RightStock is not a replacement for the Stock Selection Guide® (SSG®). It should be used before completing the SSG as a first filter to determine whether a company deserves deeper analysis. It is not a stock screener or a recommendation engine. It's a particularly useful first filter to use before club members bring a stock to a full SSG study.

The trial requires only an email address. The link is <https://www.betterinvesting.org/rightstock>.

SOMETHING TO PONDER if you have been an active watcher of CNBC for a few years.

They like to touch on the question (about every 6-months): "What should your net worth be to retire?" Their latest NEW figure is \$1,566,900. Or, if you are making \$150,000 a year, standard retirement rules suggest aiming for roughly 6X to 8X your salary (\$900,000 to \$1.2million) to maintain your lifestyle. Retiring at 55 requires a much larger pool of money (and bridge income) than retiring at 65 or 67 when full Social Security kicks in. Your personal target depends entirely on what you plan to spend each year, your debt levels, and whether your home is fully paid off. They referred to comments from Reddit on opinions as to comfort levels: their users express mixed opinions on comfort. Some feel secure at \$2.5 million, while others target much higher figures depending on family needs and desired retirement luxury.

Right now according to government statistics, the average age of head of household for under 35 is an average net worth of \$183,500. For 35-44 it is \$549,600. And, for 45-54 it is \$975,800.

If you're thinking of retiring soon: What's your figure?

If you have retired: What was your figure?

Submitted by George Stevenson, member of The Best In The Vest

