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2021 CHAPTER ANNUAL BUSINESS MEETING

Presented by: John Radford, Bob Smith & Marcia Couey

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BUSINESS MEETING AGENDA

- X Open the Business Meeting
- X Chapter Overview
- X 2020 Annual Meeting Minutes
- X 2020/21 YTD Treasurer's Report
- X 2021/2022 Programs/Goals
- X Current Directors & Director Elections
(please vote)
- X Close the Business Meeting
- X Door Prizes & Q & A

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BI MISSION

- X To provide a program of sound investment information, education and support that helps create successful lifetime investors.



THE PORTLAND CHAPTER



Area of Support

- X Southwest Washington
- X Greater Portland Area
- X Western Oregon
- X Southern Oregon

BI PORTLAND CHAPTER ANNIVERSARY CLUBS 2021

Market Madness Investors	20	Portland
Stock Trek Investor's Club	25	Camas
HRV Eagle Investors	25	Hood River
Rose City Dollars and Sense	25	Lake Oswego
Ladies Investing Financial	25	Bend
Bucks R Us Investment Club	25	Eugene
Northwest Investment Group	30	Portland

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2021 PORTLAND CHAPTER BOARD OF DIRECTORS



Left to right:

- X John Radford
- X Jon Dufrene
- X Michael Smith
- X Bob Smith
- X Marcia Couey
- X Add your name here

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2020 ANNUAL MEETING MINUTES

A year ago September at our 2020 Meeting, we:

- X Accepted the prior year's Meeting Minutes as posted on the Chapter website.
- X Reviewed the 2020 YTD Treasurer's Report
- X Set forth Goals & Objectives for this fiscal year
- X Conducted Director Elections



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CHAPTER INCOME STATEMENT AS OF AUGUST 31, 2021

REVENUE:

Interest Income	\$ 1
Charitable Contributions	<u>450</u>
Total Revenue	\$ 451

EXPENSES:

GoToWebinar Software	\$ 360
Board Member Meeting Expense	<u>115</u>
Total Expense	475

NET LOSS: (\$ 24)

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PORTLAND CHAPTER BALANCE SHEET AS OF AUGUST 31, 2021

ASSETS:

Cash in Bank -- Checking \$ 2,002

Cash in Bank -- Money Market 12,331

Total Cash and Assets \$ 14,333

LIABILITIES:

\$ -0-

NET WORTH:

\$ 14,333



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2021/22 PORTLAND CHAPTER GOALS

1. Chapter Building -- Required:

- X Planning Meeting - July 2022
- X Elections Meeting - September 2022
- X Volunteers / Board Members to attend:
one volunteer training meeting or recording
- X Recruit and mentor three new chapter
volunteers (more would be welcome!)



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2021/22 PORTLAND CHAPTER GOALS

2. Member Communications. Required (4 Communications minimum)

- X One Newsletter in August devoted to education
- X Four emails "The Buzz"
- X One postcard to all members
- X 1 postcard to all Club Contacts

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2021/22 PORTLAND CHAPTER GOALS

3. Club Support.

- X 5 Club (Virtual) Visits
- X Certificate Delivery to Anniversary Clubs
- X Mentor 1 new online investment club
- X Provide Education Programs to Clubs
- X Support the Visit-A-Club program
(Add 1 club to the list)
- X **New:** Club Portfolio Tuneup Program

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2021/22 PORTLAND CHAPTER GOALS

4. Chapter Events. Required: 1 Event

- X Continue to support:
 - X One PCC class by Kent Baldwin
 - X OLLI (at SOU) classes by Marcia Couey and Michael Smith (online)
- X **Stock Investing Made Easy** webinar series
(more to come--watch for theBUZZ)

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2021/22 PORTLAND CHAPTER GOALS

5. Membership Growth. Required: 1 Recruitment Event

- X 2021: New Member Welcome Video
(available on our website by October 15)
- X 2022: New Volunteer Social

- X See Volunteer Benefits & Opportunities
handout

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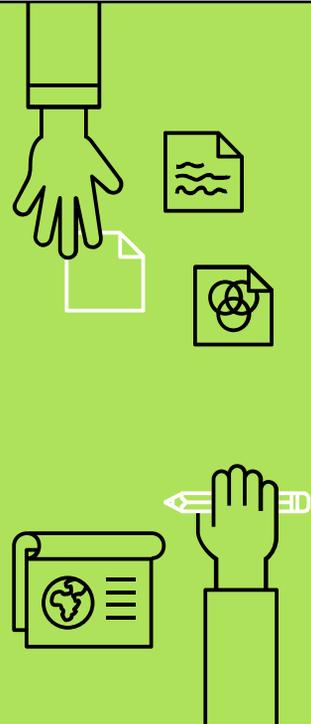
MENTORING NEW MEMBERS

New Member Video (will be posted on our chapter website by Oct.15)

Where to go Next?

contact@portland.betterinvesting.net

Or leave a message:
503-660-3247



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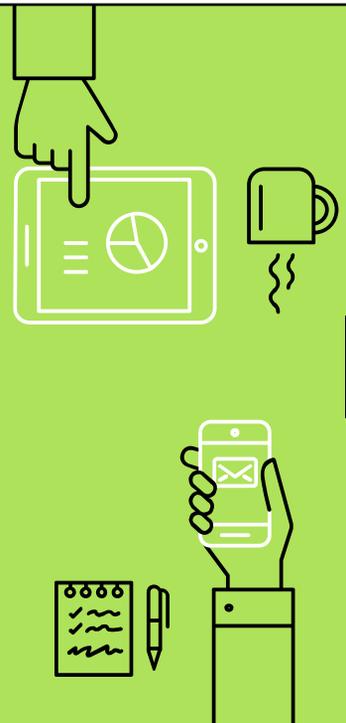
MENTORING VOLUNTEERS

New [Volunteer Benefits & Opportunities](#) Brochure

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CLUB SUPPORT:
PORTFOLIO
REVIEW

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BETTER INVESTING™
Portland Chapter

DIRECTOR ELECTIONS
Please Vote

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DIRECTOR ELECTIONS SCHEDULE

2021 Director Class

Jon Dufrene
John Radford

2022 Director Class

Bob Smith

2023 Director Class

Marcia Couey
Michael Smith



2021 DIRECTOR ELECTIONS

Shall the following Directors be re-elected for a 3-year term as Director?

Jon Dufrene
John Radford

Choices are:

Yes
No



CONGRATULATIONS

Your newly elected directors are
Jon Dufrene and
John Radford.

Congratulations!

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PRIZES

1. BetterInvesting Book Series: Book of Choice (3 Awards)
2. One Year of SSGPlus Membership (3 Awards)
3. One-Year Subscription to MyStockProspector.com
4. Online Subscription to the SmallCap Informer Newsletter!
5. Online Subscription to the Award-Winning Investor Advisory Service Newsletter!

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THANKS!

Any questions?

You can find us at:

www.betterinvesting.org/portland

contact@portland.betterinvesting.net

X message phone: 503-660-3247

