2023 Monthly Mentoring Topics

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| **2023** | **Presenter** | **Topic: Starting An Investment Club** |
| February | Howard | *It Takes All Kinds:* clubs come in all types, from family-only clubs to friends and co-workers. Some clubs operate in a quasi-professional format and others meet in a relaxed social setting. What type of club is right for you? |
| March | Cynthia | *Wanted: Club Members.* What should you look for in a potential club member? Resources you can use to find members (such as Visit-A-Club program) |
| April | Jim | *Partnering Up*: the Partnership Agreement is the founding blueprint that lays out the club’s purpose and objectives. The Operating Procedures are the day-to-day rules by which your club runs. Together, these 2 documents are the backbone of your club operations. |
| May | Charles | *Introduction To Investing For Beginners:* your club may include members who are totally new to investing. Celebrate Financial Literacy Month and start your club members on the right path to investing. |
| June | Clair | *Registering The Club*: now that your club is underway you will need to be registered. Here are some tips for registering your club and things to keep in mind. |
| July | Kyra | *Investing as an Individual*: You don’t only have to be in a club to reap the benefits of BetterInvesting, you can also be an Individual Member. |
| August | Debra | *Holding The Meeting:* what does a club meeting look like? Discussion on the general outlines of club meeting operations and structure. |
| September | Lindy | *Club Officers:* who’s in charge here? Overview of various club officer positions and roles. |
| October | Phyllis | *Club Meetings:* is this real life, is this just fantasy? You don’t just have to meet face to face, many clubs meet online too. |
| November | Liz | *Brokerage Accounts:* follow the money. Let’s discuss what a brokerage account is and how you and club can use them. |
| December | Jim | *Club Software:* Bivio and MyICLUB. Many clubs use these platforms for club accounting, stock management, and more. |
|  | N/A | *Happy Holidays!* |

2023 First Cut Schedule

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| **2023** | **First Cut** |
| January | Liz |
| February | Jim |
| March | Howard |
| April | Cynthia |
| May | Clair |
| June | Lindy |
| July | Kyra |
| August | Charles |
| September | Carl |
| October | Debra |
| November | Phyllis |
| December | Liz |