

BetterInvesting's™ Online Chapter Monthly Bulletin

May 2023

Volume 2, Issue 5

What's New?

Welcome	Message from the Presidium
Announcement	May Workshop on: Portfolio Checkup
Membership and Satellites News	Latest Membership and Satellite News
Portfolio Challenge	OLC Annual Portfolio Contest 2022-2023
Recurring Quick Access Links	

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

Presidents Committee Update

All members of the Online Chapter are invited to attend the monthly board meeting held on the first Monday of every month. Register once and you will receive meeting reminders for all future meetings. Wishing you a successful investment journey!

[REGISTER](#)

Presidents Committee,
Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata

OLC Mentoring Workshop: May Program

Our next Open Forum Workshop is May 17th at 8:30pm ET. The topic is **Portfolio Checkup**. Allen Holdsworth, who has done over 100 portfolio reviews, will share examples of mistakes and best practices to improve your portfolio health.

The meeting is simulcast on the BetterInvesting Online Chapter [Facebook](#) group and then uploaded to the OLC [YouTube](#) channel, where you can find all previous episodes.

Tune in for the big reveal: OLC Annual Meeting guest speaker! Click this [Zoom link](#) to **Register** for the meeting. You will receive a confirmation and a link to **join the meeting**.

Chris McCarron, [Membership Training & Education Chair](#)

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Chris McCarron, [Membership Training & Education Chair](#)

OLC Portfolio 2022-2023 Contest

Given the OLC news is moving this month to an earlier date, it is only 15 days since the previous, April 9th column. Not much has changed. The S & P and the average portfolio each moved up less than 1 percent, with the average portfolio outperforming the S & P by .18 of a percent. The two top portfolios remained the same. Patsy Freeman's portfolios moved the most, up 5 ranks. Edwards Lifesciences, up 7.3%, was her best performing stock.

		4/26/2023
<i>Club</i>	SUM of Investment	SUM of Value Now
Prairie Investment Partnership	\$100,000	\$118,720.24
Two Rivers Investment Group	\$100,000	\$118,066.76
Financial Escape Investment Club	\$100,000	\$116,664.32
Let It Ride Investors of Carson Valley	\$100,000	\$114,154.00
Patsy Freeman	\$100,000	\$109,786.49
Emanon Investment Club	\$100,000	\$109,242.39
Mihai Buciu	\$100,000	\$108,801.17
Bob Houle	\$100,000	\$107,926.24
Barbara J Drake	\$100,000	\$106,835.70
Yuval Goldberg	\$100,000	\$106,692.54
Marie Bartolotta	\$100,000	\$106,310.93
Laurie Mulligan	\$100,000	\$105,468.76
Kaye Light	\$100,000	\$102,973.57
Yankee Model Club	\$100,000	\$93,983.84
Cincinnati Model Investment Club	\$100,000	\$91,117.73
Carolyn Odio	\$100,000	\$88,123.96
Franklin W. Fenton	\$100,000	\$87,308.35
ISABEL S CARRILLO	\$100,000	\$85,513.11
timur yildiz	\$100,000	\$84,946.31
	\$0	\$0.00
Grand Total	\$1,900,000	\$1,962,636.40

This year's contest will run through July 31, 2023. The entrants, their portfolios, and their standings can be viewed by clicking on [Portfolio Summary](#) and [Portfolio Details](#).

If you have any questions or suggestions for further improvements, please share them with us by email at contact@online.betterinvesting.net with “Portfolio Contest” in the subject line.

Dan Perlman, [Portfolio Contest Chair](#)

Membership and Satellites Operations

We have contacted all 45 clubs celebrating a milestone anniversary for a Congratulations visit and Anniversary Certificate presentation. If your club has not yet received yours – contact us at membership@online.betterinvesting.net.

In the next month we will be contacting all newer clubs – less than 5 years old – to check in and offer support for their club.

We have volunteers available to help members reach their full investing potential. We provide mentorship to clubs and to individual members on wide range of topics:

- Forming a new club
- Club Operations
- Using The Stock Selection Guide
- Finding companies to invest in
- Club Accounting

The content, duration and timing of the visit is at the club’s discretion. Our volunteers are looking forward to celebrating you. Visit our Chapter Website for more details or email membership@online.betterinvesting.net.

Why wait until a milestone anniversary for a club visit?

- Would you like a guest speaker at an upcoming meeting?
- Could your club benefit from a question-and-answer session with someone who's "been there"?
- Could your club use some help with any of these topics?

Contact us at the above email address to arrange a volunteer visit – virtual or in person for your club today or visit the Investment Club Support section of our website.

Susanne Koster, [Director of Satellite Operations](#)

Recurring “Quick Access Links”

BetterInvesting™ National News

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BetterInvesting™ 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 this valuable weekly bulletin.

Model Investment Club Meetings

Model Investment Club meetings are sponsored by the BetterInvesting Online Chapter. They are FREE and open to all.

[International Model Stock Investing Club - REGISTER](#)

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: **Monday, May 15** at 8:30 PM ET

[Yankee Model Stock Investing Club - REGISTER](#)

- Meets the 2nd Saturday of each month
- Next Meeting: **Saturday, May 13** at 11:00 AM ET

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Editor: Sriram Madabhushi

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