

# Better Investing Pittsburgh Chapter

## Portfolio “Tune Up” Questionnaire

Has your club been around for a while? Do you enjoy reading the *Repair Shop* column in the BI Magazine?

Would you like to know if you are following the Better Investing Principles?

If the answer is YES to any of these questions then you may want to take advantage of a program offered by the local Better Investing Pittsburgh Chapter. We offer a chance for your club to have your portfolio reviewed by our seasoned team of volunteers who will be glad to assess your portfolio diversification and level of risk. With your additional input, the team can also comment on your stock analysis techniques and purchase behavior.

**Please NOTE** that the analysis of your portfolio and preparation for a presentation **can take several weeks**. Please allow sufficient time for us to plan and prepare, as well as coordinate with you the time and date of your meeting.

If you would like to take advantage of this program, please complete this form and e-mail to: [contact@pittsburgh.betterinvesting.net](mailto:contact@pittsburgh.betterinvesting.net) or to obtain more information, or answers to questions that you may have.

### Club Information

Name \_\_\_\_\_ Year Started \_\_\_\_\_

Contact Name \_\_\_\_\_ Contact Phone \_\_\_\_\_

Contact Email \_\_\_\_\_ Meeting Location \_\_\_\_\_

Number of Club Members \_\_\_\_\_ Age Range of Members \_\_\_\_\_

### Stock Study Information

Does the club use the Stock Selection Guide frequently? \_\_\_\_\_

Which software package does the club use to create the SSGs? \_\_\_\_\_

Where does the club get company data / information for analysis? \_\_\_\_\_

Which software package does the club use to create the SSGs? \_\_\_\_\_

Where does the club get company data / information for analysis? \_\_\_\_\_

Describe the investment philosophy and goal of the club \_\_\_\_\_

\_\_\_\_\_

Describe the decision making process of the club \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

