

## **Kansas City Regional Chapter (NAIC) - Member Needs Survey**

The Kansas City Chapter Directors are a volunteer organization dedicated to the education of individual investors. We desire your input to improve the level/content of your programs that we provide. Please complete this survey and mail, email, or drop it off.

Thank You from The Directors of the Kansas City Chapter, NAIC.

Name : \_\_\_\_\_

Address \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip \_\_\_\_\_

Tel: \_\_\_\_\_

E-mail: \_\_\_\_\_

(Do you want to receive an e-mail newsletter of upcoming events/announcements?)

\_\_\_ Yes \_\_\_ No)

Are you a NAIC Member? \_\_\_ Yes \_\_\_ No

How long have you been a member? \_\_\_ Years

Are you: \_\_\_ Individual Member \_\_\_ Club Member ?

### **How would you define your investing experience?**

Stocks/Equities Knowledge: \_\_\_ Novice \_\_\_ Intermediate \_\_\_ Advanced

Mutual Funds Knowledge: \_\_\_ Novice \_\_\_ Intermediate \_\_\_ Advanced

Years Investing: \_\_\_ < 2 years \_\_\_ 2-5 years \_\_\_ > 5 years

### **Reasons for joining NAIC (Check all that apply)**

\_\_\_ Publications:

\_\_\_ Better Investing

\_\_\_ BITS

\_\_\_ Investment Services:

\_\_\_ Low Cost Investment Plan

\_\_\_ NAIC Stock Service

\_\_\_ Investment Information:

\_\_\_ Green Sheets

\_\_\_ NAIC Investor Advisory Service

\_\_\_ Investment Education:

\_\_\_ National

\_\_\_ Local events

Software

\_\_\_ Classic Plus

\_\_\_ Take Stock

\_\_\_ Toolkit

\_\_\_ Stock Analysis

\_\_\_ Prospector

\_\_\_ Personal Record Keeper

\_\_\_ Club Accounting

\_\_\_ Other: \_\_\_\_\_

**Based on your needs, please identify the educational topics you would be interested in.**

The SSG class is suggested by NAIC as a 10-hour class. What format would you prefer?

- 10 continuous hours (example: 3 hours Friday night & 7 hours Saturday/next day).
- 5 x 2 hour sessions (five successive weeks on week nights)
- 2 x 5 hour sessions (two successive weekends on Saturday)
- Other (last year we taught ~4 x 4 hour classes on Saturdays)
- Beginners Stock Selection Guide (Doing a Manual SSG) ~10 hr
- Intermediate SSG - Judgement Beyond the Mechanics ~10 hrs
- Computerized SSG ~10 hrs
- How to Start an Investment Club ~2 hrs
- Investment Terminology ~3 hrs;
- How to Read the Value Line ~2 hrs
- Stock Checklist ; Quick Analysis Tool ~2 hrs
- Advanced Stock Analysis Tools (all) ~5 hrs
  - Portfolio Management Guide (PMG) ~1 hrs
  - Portfolio Evaluation Review Technique (PERT) ~2 hrs
  - Stock Comparison Guide (SCG)~1 hrs
  - Stock Challenger (SC) ~1 hrs
- Internet Resources ~2 hrs
- Investor's Round Table Discussions ~3 hrs
- Annual Reports ~ 2 hrs
- Monthly Stock Study ~ 2 hrs
- Club Accounting ~ 6 hrs
- Mutual Fund Checklist, Comparison, Trend Report ~4 hrs
- Other

Topics: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Would you be willing to participate in a weekly chat hosted by KC Chapter Directors?

Yes  No

**For shorter sessions (~2 hours), the best times for me are:**

- Weekday Evenings 6:30-9:30  Preferred  Okay  No
- Weekend Morning 9 -12:00 (Saturday)  Preferred  Okay  No

**For longer sessions, the best times are:**

- Weekday Evenings 1 day/week  Preferred  Okay  No
- Weekday Evenings Multiple days/week  Preferred  Okay  No
- Weekend Day - One day (Saturday)  Preferred  Okay  No
- Weekend Morning - Multiple weeks  Preferred  Okay  No

Please feel free to provide any additional input by contacting the Chapter directly by e-mail, mail, or phone. You can either print this and send it to our Chapter or copy and paste it to an email. Thanks for your interest in helping us provide what you want from your Chapter Directors.