



Online Chapter (OLC)



Annual Membership Meeting

August 7, 2023

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Agenda

8:00 PM
EDT

Annual Meeting

Chapter overview, accomplishments, goals, election of Directors, and portfolio contests

8:30 PM
EDT

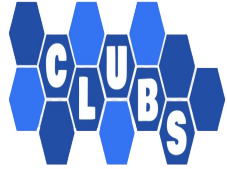
National Education Program

Doug Gerlach President of iCLUBcentral, Inc.
"Stocks in the "Maybe" Zone"

Online Chapter Overview



3,000+ members, largest chapter



379 clubs



2 online model clubs



Include 35 states and territories



26 volunteers + 3 BIVAB Directors

Online Chapter Membership Coverage



This Year's Accomplishments

Education Programs

Open Forum every odd month with guest speakers



Online Model Clubs

Sponsor model clubs which are open to public and learn best practices



Support Membership

Celebrate milestone clubs and tailor educational programs to clubs at their request



Communication

Open Forum hosted on Zoom simultaneously livestream on Facebook.

Recordings are on YouTube. Monthly newsletters sent to all members and guests

Video Library

Reviewed the BI video library and posted best in class webinars on the chapter website



Portfolio Contest

Clubs and individuals compete with best portfolio to build interest and share best practices



Anniversary Clubs

| | | | | | |
|------------|---|-------------|----|--------------|---|
| 1 Year | 3 | 10 Years | 1 | 35 Years | 3 |
| 2 Years | 4 | 20 Years | 1 | 40 Years | 2 |
| 3 Years | 3 | 25 Years | 20 | 50 Years | 3 |
| 4 Years | 2 | 30 Years | 11 | 50+ Years | 4 |

Next Year's Goals



Mission

Align with BetterInvesting mission, provide support to members and clubs located in areas not served by a local on-the-ground chapter.

Goals

Engage and support our clubs and members

Strategies

- Education programs
- Communication
- Video library
- Online model clubs
- Portfolio contests
- Visit-a-club
- Mentor young clubs
- Club networking
- Recruit and train volunteers



Join us for the [Planning Meeting](#) on September 11, 2023 @ 8:30 PM ET

Our Volunteers



Harold Ackerman

Ila Barnes

Janet Blaser

Phil Crandall

Patricia Leonard

Ernie Felzani

Jack Finn

Herman Lebron

Sriram Madabhushi

Albert Molter Jr

William Hawkins

Avi Horwitz

Thomas Martinka

Robert Walker

Philip Sudore

Tom Loftus

Barney Lyons

Terry Monasterio

Mike Vajdos

Richard Yurick

Dan Perlman

Ruth Thomas

Becoming a Volunteer

01

Volunteer

A BetterInvesting member who wishes to contribute to the chapter education mission

02

**Associate
Director**

A volunteer who wants to take on additional responsibility for programs and activities to gain experience to serve on the Chapter Board

03

Director

A volunteer who wants to be involved in the leadership and management of the Chapter Board

Submit your [volunteer application](#) to apply

Volunteering with the Online Chapter

If you would like to nominate someone or yourself for a volunteer position, please enter it in the Question box or email us at contact@online.betterinvesting.net



Election of Directors

Continuing Current Directors

JoAnne Obata

- BI member since 2010
- BI volunteer since 2014
- Co-Founder of International Model Investment Club
- Online Chapter Technology chair

Class of 2024

Ila Barnes

- BI member since 2000
- BI volunteer since 2002
- Online Chapter Secretary
- Leader, NYC Satellite

Class of 2024

Sriram Madabhushi

- BI member since 2000
- BI volunteer since 2005
- Editor, Online Chapter Monthly Bulletin
- Leader, South Central Texas Satellite

Class of 2024

Jie Eagleson

- BI member since 2013
- BI volunteer since 2015
- Co-Founder of International Model Investment Club

Class of 2025

Phil Sudore

- BI member since 1992
- BI volunteer since 1999
- Volunteer, Rochester Satellite
- Member, Online Chapter Education Committee

Class of 2025

Jack Finn

- BI member since 2001
- BI volunteer since 2020
- Leader, Yankee Satellite

Class of 2025

Chris McCarron

- BI member since 2017
- BI volunteer since 2020
- Online Chapter Education Committee Chair

Class of 2025

BIVAB Directors

Bob Houle

- BI member since 2007
- Volunteer since 2013
- BIVAB director
- President, Online Chapter

Class of 2024

Jane Chatterjee

- BI member since 1992
- Volunteer since 1992
- BIVAB director, Chair of Chapter Support Committee

Class of 2025

Howard Johnson

- BI member and volunteer since 2000
- BIVAB director, chair of Club Support Committee
- George A. Nicholson Distinguished Service Award in Investment Education

Class of 2026

Elections of Directors

Avi Horwitz

- BI member and volunteer since 1997
- A board member of five chapters
- George A. Nicholson Distinguished Service Award in Investment Education

Class of 2026

Ernie Felzani

- BI member since 1982
- BI volunteer since 1982
- President, Massachusetts Investment Club

Class of 2026

Susanne Koster

- BI member since 1996
- Founder of Emanon Investment Club
- Served New York Chapter for 6 years
- Online Chapter Satellite Coordinator since 2020
- BINC 2022 Instructor

Class of 2026

Dan Perlman

- BI member since 1997
- Served as President North Carolina Chapter & Online Chapter
- National Volunteer since 2020

Class of 2026

Vote By Poll

Online Chapter members are eligible to vote



Chapter Portfolio Contest

2022-2023 Portfolio Contest

- Initial investment \$100,000 imaginary money
- 4 to 7 stocks
- September 1, 2022 to July 31, 2023
- One opportunity in February 2023 to make portfolio changes

Portfolio Contest Results

| Entrant | Initial Investment | Ending Value |
|------------------|--------------------|--------------|
| Yuval Goldberg | \$100,000 | \$154,723.77 |
| Marie Bartolotta | \$100,000 | \$147,945.58 |

Enter the 2023-2024 Portfolio Contest

- Each club or individual member allocates \$100,000 imaginary money
- Choose 4-7 stocks
- Contest runs from September 1, 2023 - July 31, 2024
- Deadline of Submission: **August 31, 2023**

How To Enter?

Submit: [Online Contest Form](#)

OR

Email to: Contact@online.betterinvesting.net

Subject: Portfolio Contest

Submission Deadline: August 31, 2023

Online Chapter Resources

- Facebook @onlinechapterbi
- YouTube Channel @biolc
- Chapter website: betterinvesting.org/online
 - Volunteers
 - Events
 - Monthly Newsletters
 - Video library
- Email: contact@online.betterinvesting.net



BetterInvesting National Education Event



**BIVAB President & Event Host
Bobbie Kincaid**

BetterInvesting National Education Event



Doug Gerlach
President, iCLUBcentral, Inc.
Author, Speaker, and Investor