**BetterInvesting NW Buckeye Chapter**

**Tuesday, June 25, 2024 – 47th Annual Elections and Awards Meeting**

**UToledo Neff College of Business & Innovation and via GoToMeeting**

**Present: Board Members –** Marilyn Adams;Charles Bard; Dean Printy; Vicki Schade; Iris Szelagowski, 3 guests and 29 members.

**Meet and Greet 6:00 – 6:30 p.m.**

Directors and guests spent time getting acquainted while enjoying cookies and water.

**The Annual Meeting of the NWBC was called to order** by Dean Printy at 6:30 p.m. Dean started out by sharing some interesting facts about the Neff College of Business and Innovation. In 2004 John Neff demonstrated gratitude to his alma mater with a $1 million gift that created the John & Lillian Neff Trading Room which continues to benefit students today.

**2023 Annual Meeting Minutes – Iris Szelagowski**

The 2023 Annual Meeting minutes were posted on the NWBC’s webpage prior to the Annual Meeting. Hardcopies were available for review at UToledo. The June 27, 2023 Annual Meeting minutes were approved as written.

**Presentation of Service Pins** – Ken Zendel

Ken presented service pins to Marilyn Adams and Charles Bard for their 20 years of service to the NWBC.

**Recognition of Anniversary Clubs –** Ken Zendel presented the following clubs with recognition awards that he personally signed.

60 Years – Madison Associates Investment Club

55 Years – Blue Chip Investment Club 55 Years – Fort Findlay Finance Club

35 Years Take Stock Investment Club 25 Years WISE Investment Club

**2023-2024 $100,000 Dream Portfolio Contest Winners – Charles Bard**

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| **Investment Clubs** | **$100 Easy Pickin**  **Investment Club** | **$50 Gold Diggers Investment Club** | **$25 Shared Interest****Investment Club** |
| **Individuals** |  **$50 Jane Sullivan** | **$25 Vicky Wiseman** | **$15 Margaret Debien** |

**Managing Your Retirement Portfolio – Shawn Tysiak**

UToledo Senior Lecturer of Finance Shawn Tysiak discussed managing a portfolio for retirees, as well strategies that one can take to protect the principle and how to allocate funds to make their nest egg last**.** As a token of their appreciation, the chapter presented Professor Tysiak with a *New One Year SSGPlus Membership.*

**Nominations and Elections of Board Members –** Dean Printy

There were no nominations to the NWBC board. No directors were up for reelection.

**Chapter Event Door Prizes**

(2) New One Year SSGPlus Membership or Membership Upgrade – DECLINED by 2 winners

(3) BetterInvesting Book Series: Choice of one book

(1) Hanging basket

Respectfully submitted,

Vicki Schade, Secretary