



CHAPTER NEWS

Winter 2025 Newsletter

President's Message, Robin Ware

Happy New Year from your volunteers at the North Florida Chapter of BetterInvesting!

We hope your long-term investing strategy is going well. Our volunteers are always ready to support you whether you are an individual member or belong to a club. I am so proud to be a part of this award-winning chapter and its award-winning volunteers.

The North Florida Chapter exceeded its goals in 2024 providing top-notch education seminars, an education fair, and a very successful Model Investment Club. We also started a new First Cut Mentoring program which continues in 2025. Our events are widely attended, and we would be thrilled if you joined us. We are upping our game in 2025, so just go to this link and register: <https://www.betterinvesting.org/chapters/north-florida/local-events>

Our education sessions are widely recognized throughout the BetterInvesting community. In 2024, our volunteers were asked to present at the 2024 Better Investing National Convention (BINC), the StockUp program, the Consortium and events held by other chapters. So, what's happening RIGHT NOW? We had more than 130 better investors attend Part 1 of our three-part comprehensive education series focused on the Stock Selection Guide. If you didn't have a chance to join us on January 7th you can still [register](#) for Part 2 on February 4th. [Once you register](#) for our workshop, you can always view past training sessions by visiting the [chapter's website](#). Our volunteers visit clubs, coach new members, provide customized training and conduct portfolio tune-ups. Take advantage of what we offer. Below is a recent quote from a club visit: "What a great meeting last night. The guys were very engaged and you answered all our questions plus

covered some new territory." Thank you very much!! You are welcome back at any time. This comment from a local club President is why we volunteer for you!

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First Cut Mentoring - Quarterly 3rd Wednesday at 7PM ET, Jim Gallagher

We had a successful year with our monthly First Cut Mentoring Sessions, with good attendance throughout. The North Florida Chapter contributed 12 First Cuts, covering a range of stocks from Technoglas and Excellis to Glaxo Smithkline and Semler. We extend our gratitude to Charles Bright, Sandra Colon, and Matthew Dominguez, as well as board members Jim Gallagher, Bob Houle, and Robin Ware, for their valuable time and their submissions. We hope you'll join in on our sessions this coming year and bring a stock you like! Next session will be in April and the stock pick is AppLovin (APP)

<https://register.gotowebinar.com/register/2243054735604789856>

Model Club Looking for New Members, Thomas Brooks

Our Space Coast Model Club is looking for new members! The Space Coast Model Investment Club was founded in 2014. The purpose of our club is to function as an investment club and serve as a role model for other clubs.

Our club is 100% online. The biggest difference between our club

and traditional BI clubs is we are a “Model Club”. Education of partners and the audience in BI principles is what we strive to achieve while also conducting traditional club business with the goal of making money. We use MyIclub for financial accounting as well as voting buy/sell decisions. Our initial investment requirement for new partners is \$50 with the recurring monthly investment minimum of \$30.

[Register here to sign up to attend the next club meeting](#) (the first Monday of the month) at 7:30 ET. Everyone is welcome to attend meetings, without joining the club. To participate in the webinar, once registered you will get the sign in link via automated email system with reminders sent out.

To join the club, you will need to have been in attendance for two meetings, you must also be a member of BetterInvesting, and subscribe to SSGPlus. The money you invest will be pooled together with other partners as “units” in the Partnership which the club purchases shares of stocks with. The Treasurer must file a Federal Tax Return on behalf of the partners, and you will receive a K-1 at the end of each year. We all participate in the monthly meetings, we rotate stock assignments, and we rotate Education and Stock Studies for the monthly meetings.

We hope you will consider joining, no experience is necessary, but a willingness to learn and participate in stock studies will be expected.

Upcoming Virtual EduFair – Saturday April 5th SAVE THE DATE, Dan Harter

When: Saturday, April 5th, 2025, 10am to 12pm EST

What: North Florida Virtual EduFair Cost: \$10 (Registration

Link to Follow in the next month or so)

Join us for the main event of the year, our Virtual EduFair on April 5th . We will be conducting two fantastic sessions:

Find Great Stocks – join Dan Harter and Robin Ware as they navigate the BetterInvesting website, SSGPlus and a variety of other tools to find great stocks. They will ask you to jot these stocks down as they find them for the second session.

The 1-Minute Stock Selection Guide - In the second session, Dan and Robin will prepare the 1-minute SSG which will allow you to quickly review these stocks and determine if they are worthy of further analysis, consideration and just maybe your hard earned

\$\$\$.

Investment Club Connect, Phil Crocker

Introducing a New Era of Camaraderie. With [Investment Club Connect](#), it's now easier than ever for clubs to find like-minded members who are interested in joining an investment club.

Investment Club Connect is an exciting program designed to help individuals and investment clubs connect seamlessly. Many individuals have expressed a desire to join existing investment clubs, while clubs have struggled to find new members when someone leaves. For more information about this NEW program, go to [Find a Stock Investment Club Near You | Better Investing](#)

Another option is to visit our Space Coast Model Investment Club which meets online monthly on the first Monday night at 7:30 PM. We welcome guests and new members!
<https://register.gotowebinar.com/register/3967532032865033730>

BetterInvesting National Convention

The 2025 BINC, will be virtual. We will let you know of the details later. However, the 2026 BINC will be in person at a location TBD.

Other Chapters' Upcoming Events

Investment Strategy During Retirement – Pittsburgh Chapter Event

Wednesday February 19, 2025
7:30pm-8:30pm EST Free Event

The goal of this class is for you to establish a financial retirement plan to last a lifetime. You will learn how to calculate how big your nest-egg needs to be to support your retirement lifestyle. We will discuss a strategy for investing during retirement. We will conclude with a proven retirement model which is practical and easy to implement. It has been used by the author for the past 26 years with virtually no changes.

To register:

<https://register.gotowebinar.com/register/4806960827426016088>

Join the Heart of Illinois Chapter as Allen Holdsworth leads us through The Ins and Outs of Exchange Traded Funds

Wednesday, February 5, 2025 at 8:00 p.m. ET

Learn all about ETFs and their features and why they are the fastest growing investment segment in the world. We will discuss the features and variety of ETFs and where and how you might want to use them.

Register here:

<https://attendee.gotowebinar.com/register/2593739578313455190>

Digging into the BI Magazine

Join us for this free webinar sponsored by the DC Regional and Maryland Chapters of BetterInvesting. Presenters will come from the Model Investment Clubs in the Mid-Atlantic region.

Stocks: NICE, Ltd. (NICE), Sysco Corporation (SYU), Palantir Technologies, Inc. (PLTR), Powell Industries (POWL)

You can also [view all the previous events here](#). Please like and subscribe to the channel. This month's stocks were found using the current issue of the [BI Magazine](#) or from the [BI website magazine archives](#).

Click Here to register.

<https://www.betterinvesting.org/chapters/dc-regional/local-events/investing-february>

Multi-Chapter Consortium Webinars held last year are available. Links to the recordings plus the handouts here:

<https://www.betterinvesting.org/chapters/inland-empire/news-articles>

Some of the great topics covered were:

Coach, Is Offense or Defense More Important? (Robin Ware,
Mike Torbenson, John Blais -October 30, 2024)

Is Value Line Still Valuable? (David Lenig/Marcia Couey April
29, 2024)

Retirement & The Tax Man (Christi Powell - February 29, 2024)

BetterInvesting Resources

If you are not currently a member of BetterInvesting, we invite you to come and learn our commonsense approach to stock investing. [You can get started by sampling our resources.](#)

You will get:

A digital copy of BetterInvesting Magazine

Our “Why Invest” webinar

First Cut Stock Reports

Instant access to a trial version of our online stock selection and analysis tools

Please join us as we learn together!

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<https://www.betterinvesting.org/chapters/north-florida> and fill out the form. **We'd love to have you join us!**

Thanks!

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You have received this email as: dan.m.harter@gmail.com

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