



**San Francisco Bay Area Regional Chapter**  
**CLUB VISIT REQUEST FORM**  
(Filled out by Club)

Date of request:

Club Name:

Club Contact:

Phone:

E-mail address:

Meeting location:

Date and time of meeting:

Preference for date and time of club visit:

Focus of visit:

- a. Forming an investment club
- b. Help with SSGs
- c. Short class
- d. Troubleshooting & problem solving
- e. Other:

Age of Club:

Number of partners:

Is your club a member of BetterInvesting ?

How many of your club members are BetterInvesting members ?

Which software programs (if any) does the club use for analysis ?

1. Stock & mutual fund analysis:

BI Online Tools       Toolkit       Other

2. Online Data Services:

BetterInvesting Online Tools       ICLUBCentral

3. Club Accounting:

MyICLUB.com

Bivio

Other

Do any of your members use Macs?



Club Visits Policy

A club visit is provided to put on a short class for the club, get new ideas, find out what's available through the chapter and BetterInvesting, or assist a club in resolving any problems they may be having,

A Chapter Board member will visit your club (or prospective club) to discuss programs, financial goals, BetterInvesting and resources, provide general guidance, answer questions or focus on other topics of your choice. Typically, club visits last approximately 45 minutes.

Each club is entitled to one visit per year at no charge.

New clubs, particularly those in the formative stages, are especially encouraged to take advantage of a club visit and may be granted more than one each year.

Complete this Club Visitation Request Form and send it to the Chapter via email.

- Email: [naicsf@yahoo.com](mailto:naicsf@yahoo.com)