

# BetterInvesting's™ Online Chapter Monthly Bulletin

January 2024

Volume 3, Issue 1

## What's New?

OLC Presidents' Message	Online Chapter Presidents' Committee Update
2024 BINC	Better Investing National Conference
OLC Mentoring Workshop	January Mentoring Workshop - Options Trading
Membership and Club Visits	Membership and Club Visits
Volunteers	Join us
Portfolio Challenge	OLC Annual Portfolio Contest 2023-2024
Model Investment Clubs	Model Investment Club Meetings
BI National News	<a href="#">Recurring Quick Access Links</a>

## Online Chapter Presidents' committee Message

Happy New Year! The past year has been a rollercoaster of a ride with yields on cash around 5% and an equity market that looked to be slumping all year – and then sped up and raced to the finish line. It seems we will skirt a recession long forecasted and the Federal Reserve has signaled rate hikes are over.

What will 2024 hold? For many BetterInvesting members – the same as last year and the past 10, 20 or 30 years. We seek to buy equities at fair prices, looking for companies with solid finances, good growth prospects and competitive advantages. We buy and hold as long as conditions remain favorable.

**Presidents Committee,**

**Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata**

## 2024 BINC

**BetterInvesting National Convention**

**May 16-19 at the Marriott Chicago O'Hare**

[Register NOW!!!](#)

The National Convention is BetterInvesting's largest premier event designed to educate individuals with a wide array of financial information.

Attendees from across the nation. can experience basic financial education, beginning investors can experience a disciplined approach to stock analysis and experienced investors can sharpen their skills with a goal to increase their net worth.

Held in a different city each year, the four-day convention features nationally known speakers, plus seminars, tours, social events and one of the largest displays of investment information, education and ideas in the country.

## OLC Mentoring Workshop

Our next open forum meeting on January 17th will have a Saul Seiberg presentation on Technical Analysis. I hope you'll join us for what promises to be an excellent presentation to start the year. Thanks to Dan Perlman for coordinating with Saul and for his outstanding work as a volunteer for the Education Committee.

When: Wednesday, January 17, 8:30 PM (ET)

Topic: Saul Seiberg's presentation on Technical Analysis

How: Register for the [Zoom](#) meeting. You will receive a confirmation and a link to join the meeting.

The meeting will also be simulcast on the BetterInvesting Online Chapter [Facebook](#).

You can also find all workshop recordings on the chapter YouTube channel [here](#) and the [chapter's webpage](#) under News and Articles.

Contact [Chris McCarron](#), Membership Training & Education Chair if you have any feedback or ideas for future workshops.

*Chris McCarron, [Membership Training & Education Chair](#)*

## Membership and Club Visits

Introducing Investment Club Connect – a member-exclusive program designed to help individuals and investment clubs connect seamlessly.

Are you looking for a Club to Join? Does your Club need new members?

NAIC/BetterInvesting has rolled out a new member-driven program designed to better connect individual investors with stock investment clubs. Investment Club Connect helps clubs who desire to add new members to find like-minded BetterInvesting members interested in joining an existing investment club.

Here's how it works:

1. Individual members express their interest in joining a club, and we maintain a confidential list of these individuals, along with clubs open to adding new members.
2. Our custom matching technology considers factors like gender, distance, and other preferences to present individual member information to existing clubs.

3. Clubs can then decide whether they wish to connect with a prospective new member, and if interested, they can reach out directly.
4. There's no obligation for either party – think of it as investment club dating!
5. Best of all, this service is entirely free for BetterInvesting members!

**The next 4-BITS volunteer training will be on January 29, 2024 at 8:30 PM EST.**

And – our club visits have become so popular we are actively seeking volunteers. Training will be provided. Please contact us at [membership@online.betterinvesting.net](mailto:membership@online.betterinvesting.net)

## Volunteers

Interested in volunteering with our chapter? Not sure how to get started? Training is provided and your contribution can be as large or small as your time permits. Please contact us at [membership@online.betterinvesting.net](mailto:membership@online.betterinvesting.net) for more information.

For our current volunteers – THANK YOU! Our Chapter runs on your valuable contribution.

## OLC Portfolio 2023-2024 Contest

December 2023: Another Good Month

December was another good month for the stock market and an even better month for entrants in the OLC portfolio contest. The S & P 500 increased 1.04 percent in December while the average portfolio, having gotten behind earlier in the fall, gained 10 per cent as of the morning of December 28. The two highest gaining stocks since the last report were Axos (36%), an online bank, and Enphase Energy (27.3%), a technology company whose products help in solar energy generation, storage, control, and management. Four of the five contest portfolios are now ahead of the S & P 500, with the Financial Escape Investment Club, up 15.2 per cent, being the leading portfolio.

You can see information about the portfolios by clicking on [Portfolio Summary](#) and/or [Portfolio Details](#). For other questions or comments, please email [contact@online.betterinvesting.net](mailto:contact@online.betterinvesting.net) with “Portfolio Contest” in the subject line.

*Dan Perlman, Portfolio Contest Chair*

## Recurring “Quick Access Links”

### BetterInvesting™ National News

Part of your membership benefit package is enrollment in *BI Weekly*. Every Thursday, BetterInvesting™ emails all members a bulletin listing national webinar registrations, StockUps, TickerTalks, First Cut Stock Reports and more. You don't want to miss it!

If you are not receiving your *BI Weekly*, go to your [BI member profile](#) and update your *Email and Product Subscription Information* selections to let BI you would like to routinely receive this valuable weekly bulletin.

## Model Investment Club Meetings

Model Investment Club meetings are sponsored by the BetterInvesting Online Chapter. They are FREE and open to all.

### [Yankee Model Stock Investing Club - REGISTER](#)

- Meets the 2nd Saturday of each month
- Next Meeting: **Saturday, January 13** at 11:00 AM ET

[International Model Stock Investing Club - REGISTER](#)

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: **Monday, January 15** at 8:30 PM ET

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