



BetterInvesting Online Chapter (OLC)



6th Annual Membership Meeting

August 11, 2025

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Agenda

8:00 PM
EDT

Annual Meeting

Chapter overview, accomplishments, goals,
election of Directors, and Portfolio Contest

8:30 PM
EDT

Education Program

Jackie Cummings Koski, CFP®, AFC®

Financial Educator & Consultant

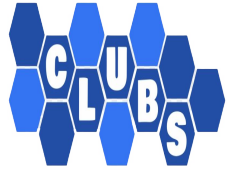
BetterInvesting Board of Directors

***A Money Journey that Began with a Club and
Continues with a little FIRE***

Online Chapter Overview



3,000 members, the largest chapter



200+ clubs



2 online model clubs



Includes 35 states and territories



17 volunteers + 3 BIVAB Directors

The 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

Partnership

Joined consortium webinar *Stock Investing Made Easy*



Portfolio Contest

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





Anniversary Clubs

1-4 Years	14	35 Years	5
5 Years	4	40 Years	2
20 Years	3	45 Years	1
25 Years	8	60 Years	1
30 Years	17	65 Years	1



Clubs We Have Visited

- Massaco Investment Club
- Buffalo Area University Women
- FOJ Investment Group
- Simsbury Investment Club
- Mad Money Mavens
- New York Women's Investment Club
- Dawson Investors Club
- Snake River Investment Club
- Family Investment Group

Upcoming Club Visits

- Let it Ride Investors
- 19th Ward Women's Investment Club
- Kingfisher Investment Group
- Temecula Investment Group
- 515 Madison Investment Club

Club Visit Benefits



Interested in a visit by one of our volunteers?
Contact us: contact@online.betterinvesting.net

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
- Consortium Partnership
- Online model clubs
- Portfolio contests
- Club Visits
- Mentor young clubs
- Club networking
- Recruit and train volunteers

Our Volunteers

**Board of Directors**

Ila Barnes	Sriram Madabhushi	Jack Finn
Jie Eagleson	Chris McCarron	Philip Sudore
Ernie Felzani	Dan Perlman	
Susanne Koster	Janet Blaser (Associate Director)	

Volunteer Members

Phil Crandall	Herman LeBron
Patricia Leonard	Terry Monasterio
Barney Lyons	JoAnne Obata
Laura Tutton	

Abraham I Horwitz - “Avi”



Avi's leadership in the Multi-Chapter Education Consortium was especially inspiring. The way he brought together six struggling chapters and transformed them into a collaborative force, producing widely recognized and acclaimed investing webinars, was a testament to his vision and dedication.

That effort, like so much of Avi's work, will continue to benefit investors and volunteers for years to come. His memory lives on through their contributions to others seeking financial security and independence.



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

BIVAB Directors

Howard Johnson

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

Class of 2026

Bob Houle

- BI member since 2007
- Volunteer since 2013
- BIVAB director, Club Support Committee Chair
- George A. Nicholson Distinguished Service Award in Investment Education

Class of 2027

Jane Chatterjee

- BI member since 1992
- Volunteer since 1992
- BIVAB director, Chapter Support Region Liaison

Class of 2028



Online Chapter Regional Mentor

Kent de Jong

- BI Member since 1998
- Volunteer since 1999
- BIVAB Volunteer since 2023
- BINC Instructor



Continuing Current Directors

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

Class of 2026

Dan Perlman

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

Class of 2026

Ila Barnes

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

Class of 2027

Sriram Madabhushi

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

Class of 2027

Chris McCarron

- BI member since 2017
- BI volunteer since 2020
- Online Chapter Education Committee Chair
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Class of 2027

Election of Directors

Jie Eagleson

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

Class of 2028

Phil Sudore

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

Class of 2028

Jack Finn

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

Class of 2028

Vote By Poll

Online Chapter members are eligible to vote





Chapter Portfolio Contest

2024-2025 Portfolio Contest



**INITIAL INVESTMENT
\$100,000 “FUN” MONEY**



4 TO 7 STOCKS



**SEPTEMBER 1, 2024 TO
JULY 31, 2025**



**ONE OPPORTUNITY IN
FEBRUARY 2025 TO
MAKE PORTFOLIO
CHANGES**



2024-2025 Portfolio Contest Results

Entrant	Initial Investment	Ending Value	Percent Return
Two Rivers Investment Group	\$100,000	219,431	119%
Let It Ride Investors of Carson Valley	\$100,000	\$169,672	70%
Tom Mertens	\$100,000	\$152,720	53%
Bob Houle	\$100,000	\$151,301	51%

2025-2026 Portfolio Contest

Each club or individual member allocates \$100,000 “Fun” money

Choose 4 to 7 stocks

Contest runs from 9/1/25 to 7/31/26

Submission Deadline: **08/31/2025**



How to enter?

Submit: [Online Contest Form](#)

OR

Email to:
contact@online.betterinvesting.net

Subject: Portfolio Contest

Submission deadline: August 31, 2025

Online Chapter Resources

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



Online Chapter Education Event



**Online Chapter Co-President &
Education Program Lead
Event Host
Chris McCarron**

Online Chapter Education Event



Jackie Cummings Koski, CFP®, AFC®
Financial Educator & Consultant
BetterInvesting Board of Directors