

BetterInvesting's™ Online Chapter Monthly Bulletin

April 2024

Volume 4, Issue 4

What's New?

OLC Presidents' Message	Online Chapter Presidents' Committee Update
2024 BINC	Better Investing National Conference
OLC Mentoring Workshop	May Mentoring Workshop - BINC with a Bang!
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	Recurring Quick Access Links

Online Chapter Presidents' committee Message

Do you know what T+1 means? How about T+2? Check out changes coming to your brokerage account.

From FINRA.ORG:

Did you know there's a difference between the date you trade a security and the date the transaction settles? Trade date is the day your order to buy or sell a security is executed; settlement date is the day your order is finalized and on which funds and the securities must be delivered.

Currently, settlement date occurs two business days after trade date T+2, but recent rule amendments from the Securities and Exchange Commission (SEC) and conforming FINRA rule changes will soon make that cycle one day shorter.

Beginning on May 28, 2024, the new standard for settlement will become the next business day after a trade, or T+1. The move to T+1 reflects improvements in technology that allow trades to settle more quickly. You might not notice a change, as many brokerage firms currently require investors to have the needed funds in cash accounts before making a purchase.

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 from basic financial education to workshops for experienced investors. Join Us!

Top Reasons to Attend:

Experience Educational Sessions for all level of Investors

Learn how to grow the return on your investments

Talk face to face with nationally recognized experts

Make new long-lasting friendships

Two Fabulous Guest Speakers:

Jackie Cummings Koski is a financial literacy expert and the owner of Money Letters, LLC. In addition to being a CERTIFIED FINANCIAL PLANNER™, Jackie holds a Master of Science in Personal Financial Planning. She is also the author of the award-winning book 'Money Letters 2 My Daughter'. Ms. Cummings Koski will share her life experiences and how BetterInvesting helped shape her financial journey.

Ralph Acampora is a lifelong supporter of the mission of BetterInvesting. Mr. Acampora better known as the Godfather of Technical Analysis, will bring his unique insights on market timing and investment strategies that have earned him the reputation he deserves. In addition, Ralph will be teaching a session on Technical Fusion, the melding of fundamental and technical analysis.

OLC Mentoring Workshop

We had a great presentation on March 20th, Mel Crotzer on 'Discount Cash Flow Analysis'. It was well received and a good Q&A session followed. Recordings of all past workshops are available on the chapter YouTube channel [here](#) and the [chapter's webpage](#) under News and Articles.

Stay tuned and register for the next workshop using the link below.

When: Wednesday, May 15th, 8:30 PM (ET)

Topic: BINC with a Bang! What are some must do classes at the BINC 2024

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](#).

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

[REGISTER](#)

. *Chris McCarron, Membership Training & Education Chair*

Membership and Club Visits

Membership

Our club visit schedule is robust. Congratulation to these clubs we have already visited:

- Collective Securities Group
- Generational Wealth Investment Club
- MMM Investment Club
- Jones Girls

Several Clubs have already locked in their date – most have requested a short education topic and a general discussion on club operations.

Is your club interested in a visit? We have new volunteers ready to assist. Visit our Chapter Website for more details or email membership@online.betterinvesting.net.

Visits generate buzz and create interest with educational programs or a simple chat with one of our volunteers. The cost – FREE! The energy and information that comes along with the visit – priceless. Your club visit may be tailored to your club. Many clubs we visited enjoy a short presentation on researching companies or a review of Stock Selection Guide – or an introduction to how to begin. Perhaps a review of the new, rich features on the BetterInvesting Website included in your membership.

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

Visit our [Chapter Website](#) for more details or email membership@online.betterinvesting.net

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? Check out Investment [Club Connect](#) – it helps clubs who desire to add new members to find like-minded BetterInvesting members interested in joining an existing investment club.

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 for more information.

The next 4-BITS volunteer training will be on April 25 at 8:30 PM EST. Please check the website for more information.

There will also be 4-BITS training sessions on June 10, July 22, August 27 and September 18. Mark your calendars.

BetterInvesting National Convention – BINC – May 16-19 at the Marriott Chicago O'Hare

[Learn more!!!](#) Or Call: 877-275-6242

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

OLC Portfolio 2023-2024 Contest

March 2024: Another See-Saw Battle

The period from February 29 to March 26 (the date of this writing), left the average portfolio value up 2.2 % and the S & P up 2.1 %. Since the beginning of the contest the average total increase in the value of the average contest portfolio is in a near dead heat with the S & P 500, the average portfolio up 15.6% and the S & P up 15.4%, respectively. The two top-gaining portfolios were the same this month as last: Let It Ride Investors of Carson Valley, first, and Emanon Investment Club, second. The gap between them, however, has narrowed. Emanon was helped by having the best gaining stock during this period, Shockwave Medical (SWAV), up 21 percent. SWAV was also a leading gainer in January. It has developed an innovative treatment for atherosclerotic cardiovascular disease by safely using sonic pressure waves to disrupt calcified plaque, resulting in significantly improved patient outcomes.

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 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, April 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, April 15 at 8:30 PM ET