

BetterInvesting.

Online Chapter *Monthly Bulletin*

March 1, 2022

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President's Message

Welcome to the Online Chapter's new *Monthly Bulletin*. We're trying to get timely and interesting information out to all our members in a form that is easy and quick to read (and secure to access). This is our second issue, so we really welcome your feedback to us at [OLC Monthly Bulletin Editor](#) on how we can better serve your needs.

In this edition, we have more information on our chapter's *pilot* portfolio contest. We welcome your ideas on how our first portfolio contest that will start this summer can be structured to provide real examples of applying BI principles to stock selection and portfolio design. More information in Dan's article.

In March's *Open Forum* Chris' member Education & Training Committee will lead a discussion on how to find new stocks to study. This *Open Forum* is a new way to share

ideas in an open, two-way conversation that you can't just get from normal webinars. Come and join us on the 16th!

There are many more interesting and informative articles in this edition. Please, let us know what you would like to see by sending us an email at [OLC Monthly Bulletin Editor](#).

Bob Houle, [OLC President](#)

BetterInvesting™ Model Stock Investment Clubs

Are you looking for an investment club to visit in your area? Our Online Chapter (OLC) has membership in many time zones. You might want to start your journey by visiting one or all three of the online model clubs sponsored by our chapter. We have one each in East, Central, and Pacific time zones. If you can't make one of their live meetings, two of them archive their meetings on YouTube.com (in YouTube, search for "international model investment club" or "Yankee model investment club").

But BetterInvesting™ has 46 other model clubs throughout the United States that you may want to visit. To help you find them, we have curated a list of active model clubs in the other BetterInvesting™ chapters that you may be interested in visiting. Click to access the **curated list** to find a model club hosted by our partner chapters. Please report any corrections to the [OLC President](#). Let us know how this directory can be improved *for you*.

OLC Pilot Portfolio Contest 2022

The OLC Pilot Portfolio Contest began with enthusiasm with entries from eight OLC clubs on February 13, 2022. It will continue through July 29, 2022. The purpose of this pilot start is to be able to get ideas from the participating clubs on how to structure the annual contest (starting in August 2022). During the pilot period, we are planning on holding a workshop to gather ideas from both contest participants and others interested in participating in future contests on how this contest can be structured to be a meaningful educational event that reinforces BI's principles and stock analysis tools.

The entrants, their portfolios, and their standings can be viewed by clicking on [Club Summary](#) and [Club Portfolio Details](#). Periodic updates on the progress of the Portfolios will be published here and sent to our members via Interspire emails, **OLC Social Media Pages**, and **News and Articles** section of the [OLC Webpage](#). Stay tuned for an announcement, likely in mid June, of the first annual contest to start at the beginning of August, 2022. If you have any questions or suggestions, email contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Dan Perlman, [Portfolio Contest Chair](#)

OLC Mentoring Workshop: March Program

The Online Chapter of BetterInvesting is offering a mentoring workshop for all our investment clubs and individual members on Wednesday, March 16th at 8:30 p.m. ET (7:30 p.m. CT, 6:30 p.m. MT, 5:30 p.m. PT and 1:30 a.m. GMT on March 19th) via <https://meet.goto.com/DanPerlman1>

The interactive workshop will open with a presentation about **Finding New Stocks**. Do you struggle with finding new stocks to balance your portfolio? Join us to explore new ideas or to share your innovative strategies. After this short presentation, the floor will be open for you to pose your questions on any topic related to stock investing or investment clubs.

We need your help to serve you at the highest level.

- What knowledge do you need to be a successful stock investor?
- What support do you want, and expect, from your Online Chapter?
- What are your ideas, topics, concerns, and what knowledge do you think would make you a better investor?

Your feedback will define this workshop and set the focus for the ongoing work of the Education Committee. This is your opportunity to get answers to questions that may be holding you back. No BetterInvesting topic is off-limits.

Please take this [short survey](#) so you can share your priorities and interests with us.

At the appropriate time, depending on your time zone, please join us at <https://meet.goto.com/DanPerlman1>. We look forward to meeting you.

The following two sessions are on May 18, 2022 and July 20, 2022. All starting at 8:30 pm ET. To join us, just click on this [GoToMeeting](#) link. Details can be found on the [chapter's webpage](#).

Please join us so that we all can benefit from the shared wisdom and experience of the BetterInvestors™ members in the audience and the volunteers from the chapter.

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

Club Support Update: Club Visits

There are almost 400 stock investment clubs in the Online Chapter and they all have the same goal of bringing new partners to grow the clubs. BI experience shows that when a club does not grow by adding new enthusiastic members who can contribute to the success of the club, there is a good chance the club will become stagnant and eventually may even perish. So we would like to visit your club, virtually or in person (especially those clubs which meet in public places) to bring the strength of the OLC to support your club in any way possible to grow and flourish.

We hope your club partners will be prepared to hear from the experienced OLC volunteers to answer your questions and willing to share your experiences with those who are just beginning the journey to become better investors.

For more details or information or questions, email: contact@online.betterinvesting.net

BINC Registration

BINC is back and we're looking forward to you joining us in Dallas for our 70th birthday. The convention runs from the 23rd through the 26th of June. After a two year hiatus we are all ready to get together again and take that next step up in our investor education.

Don't miss out on the party. Register today at a reduced cost by going to www.betterinvesting.org/binc.

Satellites

What's a Satellite?

The Online Chapter is composed of several Chapters that have closed and other members that geographically did not belong to a Chapter. Some areas of the USA have a concentration of members – many from closed Chapters. If there are volunteers trained, ready and willing and able to serve, the OLC has formed a geographic group called "Satellites".

What is the Satellite Objective?

Provide the opportunity for each BetterInvesting member in the local area to develop the investing skills needed to achieve financial security and independence

Where are the Satellites?

Long Island, New York City, Rochester and Yankee (Connecticut, Massachusetts and Rhode Island)

For more information [click here](#).

Susanne Koster, [Secretary and Satellite Coordinator](#)

Club Milestone Anniversaries

The highlight of each year's chapter support for our stock investing clubs is the opportunity to showcase the clubs celebrating their 5 year anniversaries. In our chapter this year we will be recognizing 78 clubs with club anniversaries ranging from 65 to 10 years of continuous service.

Volunteers from the Online Chapter will be in touch with the club's contact person to setup a time (most likely online with COVID) for a formal Anniversary Certificate presentation along with a special training opportunity, tailored for each club's needs. Details will be provided as we contact each club.

Howard Johnson, [Club Support Committee Chair](#)

BetterInvesting National News

Do not forget to check your **BI Weekly News** in your email every Thursday, which is your go-to place for National Webinars registration, StockUps, Ticker Talks, FirstCuts, etc.

If you are not receiving your **BI Weekly News** in your email every Thursday, go to your BI member profile and update Email Subscription Information by clicking the box next to BetterInvesting Weekly e-newsletter to receive these valuable News emails. For More Information or Help, Please contact: contact@online.betterinvesting.net

Jane Chatterjee, [OLC Chair](#)

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