|  |  |
| --- | --- |
| Date & Time | Tuesday Apr 21 2021 0700-0900PM |
| Location | Online ONLY via GoTo Meeting |
| Online Information | https://global.gotomeeting.com/join/251997157  You can also dial in using your phone.  United States: +1 (312) 757-3121  Access Code: 251-997-157 |

Agenda

|  |  |  |
| --- | --- | --- |
| 07:00-07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Call to Order | Amy Laing |
| 07:05-07:10 PM | New Asst Treasurer: Pat Onufrak | Gladys |
| 07:10-07:15 PM | Secretary’s Report   * Approval of March Minutes (posted in Bivio) | Maskey |
| 07:15-07:40 PM | Education: How to do “Preferred Procedure” in SSG | Kathy Emmons |
| 07:40-08:00 PM | New Stock Presentation: Vertex Pharmaceuticals (VRTX)  (Next Month: Amy) | Jonathan Timmes |
| 08:00-08:30 PM | Stock Reports  AX – Ty  ADBE-Baskar  ANCUF- Pat  Gentex - Wilbert  MNST – Gladys for Kent | Ty  Baskar  Pat  Wilbert  Gladys for Kent |
| 08:30-08:35 PM | Treasurer’s Report | Gladys |
| 08:35-08:45 PM | Portfolio Report | Ty |
| 08:45-08:50 PM | Decision: Buys and Sells | Partners |
| 08:50-08:55 PM | Member Questions about Investing in General: Send question to Amy (amy@tegwyn.com) | Experts will Answer |
| 08:55-09:00 PM | Upcoming Events and Announcements (***see below***) | Amy Laing |
| 09:00 PM | Adjourn | Amy Laing |

BI and Community Events & Announcements

|  |  |
| --- | --- |
| March 2021 | BI Membership Renewal are DUE for 2021 |
| Wed Apr 22 2021  07:00 PM-09:00 PM  (3rd Wednesdays) | **Montgomery County Model Investment Club (MCMC) Monthly Meeting**  Visitors are Welcome. Free Event: Online via GoTo Meeting  More information at: <https://www>.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-maryland-apr |
| Sat May 1 2021 10:30 AM – 01:00 PM | **DC Chapter Club Recognition Program:** Love to hear fascinating stories? Our honorees will share the secrets to their success: what makes their clubs engaging for their members, lessons learned, wisdom gained, the benefits of belonging to a club, etc. Use their experience as a bridge to your success!  Please join my meeting from your computer, tablet or smartphone.  https://global.gotomeeting.com/join/698631101  You can also dial in using your phone.  (For supported devices, tap a one-touch number below to join instantly.)  United States: +1 (571) 317-3112  - One-touch: tel:+15713173112,,698631101#  Access Code: 698-631-101 |
| Mon May 3 2021  07:00 PM – 08:00 PM | **DMV Chapters presents: Digging into the BI Magazine May 2021**  Join the DC Regional Chapter along with the Maryland Chapter of  BetterInvesting for free webinar where we examine the featured stocks from  the most recent issue of the BI Magazine. This event is designed for both  beginners and those looking to improve their judgment on the SSG. In a little  over an hour, we will have four stock presentations using the current issue of  BI Magazine or using the features from the BI website.  Registration URL  https://attendee.gotowebinar.com/register/2299578406083008015  Webinar ID  914-863-699 |
| Tue May 11 2021  07:30PM-09:00PM  (2nd Tuesdays) | Money Matters (Book Club)  May Title: **The System: Who Rigged It and How We Fix It**  **By Robert Reich, 2020, 206 p.**  In the latest of his 15 books Robert Reich, Labor Secretary during the Clinton Administration, claims that the economic system in the U.S. is an oligarchy, rigged to favor the wealthy and politically powerful., who use their clout to increase their wealth and power. He blames the rise of shareholder capitalism, the erosion of union power, and deregulation of the financial industry He calls for a more equitable rebalance of power. |
| Tue May 18 2021  07:00PM–09:00 PM  (3rd Tuesdays) | MicNOVA Model Investment Club (MicNOVA) Monthly Meeting. Visitors are welcome. Free Event: Online via GoTo Meeting. More information at: <https://www>.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-nova-may |
| 90 Days to Try SSG Free | Better Investing offers Non-Members to try SSG Plus/Core SSG for FREE.  Check out: <https://www>.betterinvesting.org/find-great-stocks/online-tools |
| BINC 2021  10/21/2021-10/24/2021 | BetterInvesting National Convention  The Westin Dallas Park Central  Texas |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Name | New Stock Presentation | Conduct MicNova Monthly Meeting | Conduct MicNova Planning Meeting |
| 1 | Patterson, Shervl | 9/21/2021 | 11/16/2021 | 11/11/2021 |
| 2 | Billmver, Kent | ~~11/17/2020~~ | ~~12/15/2020~~ | ~~12/10/2020~~ |
| 3 | Hughes, James A.(Ty) | ~~1/19/2021~~ | 10/19/2021 | 10/14/2021 |
| 4 | Krishnarao, Maskev, Sec. | 11/16/2021 | 5/18/2021 | 5/13/2021 |
| 5 | Krishna, Arvind K | 10/20/2020 | 8/17/2021 | 8/12/2021 |
| 6 | Arumugam, Baskar | 2/16/2021 | 10/20/2020 | 10/15/2020 |
| 7 | Henrikson, Gladys | 3/16/2021 | 09/21/2021 | 09/16/2021 |
| 8 | Murphy, Josephine C (Jo) | 12/15/2020 | ~~1/19/21~~ | ~~1/14/2021~~ |
| 9 | Emmons, Elinor (Kathy) | 9/15/2020 | 2/16/2021 | 2/11/2021 |
| 10 | Laing, Amy Gay | 5/8/2021 | 4/20/2021 | 4/15/2021 |
| 11 | Nixon, Wilbert | 6/15/2021 | 7/20/2021 | 7/15/2021 |
| 12 | Onufrak, Patricia | 7/20/2021 | 3/16/2021 | 3/11/2021 |
| 13 | O’Mara, W. Paul | 8/17/2021 | 11/17/2020 | 11/12/2020 |
| 14 | Timmes, Jonathan | 4/20/2021 | 6/15/2021 | 6/10/2021 |

Schedule: New Stock Presentation, Planning and Monthly Meeting Chair

Last Month This Month Next Month

Schedule: Education

|  |  |  |  |
| --- | --- | --- | --- |
|  | Title | Presenter | Date |
| ~~1~~ | ~~How to present 5-min stock report(Ticker Talk Webinar Ken K)~~ | ~~Sheryl/Ken K Video~~ | ~~10/20/2020~~ |
| ~~2~~ | ~~How to invest in ETFs - such as in the gaming programs, like NERD~~ | ~~Linda Hunt~~ | ~~11/17/2020~~ |
| ~~3~~ | ~~Stock screening in the BI SSG (Part 1 of 2)~~ | ~~Baskar~~ | ~~12/15/2020~~ |
| 4 | ~~How to use cash flow vs P/E to determine investability in a new/young company~~ | ~~Gladys & Carol~~ | ~~1/19/2021~~ |
| 5 | ~~Other good sources for finding good stock ideas: Ticker Talk, Stock-up, Manifest, VL, MS, Barrons, Invest Adv Svc, WSJ, Other Newsletters (Part 2 of 2)~~ | ~~Jo Murphy~~ | ~~2/16/2021~~ |
| 6 |  |  | 3/16/2021 |
| 7 | How to do “Preferred Procedure” in SSG | Kathy | 4/20/2021 |
| 8 | PERT Charts from the SSG/SSG Plus | Sheryl | 5/18/2021 |
| 9 | One page Quick Analysis of a Stock | Baskar | 6/15/2021 |
| 10 | How to navigate and use Yahoo Finance as a source for stock ideas and analysis. | Jonathan | 7/20/2021 |
| 11 | Ratios using Price | Gladys/Sheryl | 8/24/2021 |
| 12 | Exploring the "Research" Tab in SSG | Arvind | 9/21/2021 |
| 13 | Different types of orders you can place with your broker (Limit, Market, Trailing, Stop Loss) | Amy | 10/19/2021 |
| 14 | Basics of using Stock (price) charts to see if/when stock is in Buy Zone (with cheat sheets for 50/200 day Moving avg & RSI, other ratios | Ty/Wilbert | 11/16/2021 |
| 15 |  |  | 12/21/2021 |
|  |  |  |  |
|  | How to calculate a Signature P/E (Bonnie Biafort Book) | Linda |  |
|  | Alternative approaches to constructing & managing a portfolio: style, industry; performance to S&P 500 |  |  |
|  | Introducing Detailed Estimates in SSG Plus (1 of 2) ; Add Analyst Estimates to Your SSGs : Ticker Talk July 2020 |  |  |
|  | "Research and Your SSG" , 2nd of 2 "Adding Judgement" programs (Stock-up Sept 10 2020- Ken Kavula/Ann Cuneaz). Gt tips for what to  look for in Value Line, Morningstar, CFRA, Company reports and more. |  |  |
|  | New Tools/Capabilities in the SSG. |  |  |
|  | Addressing anomalies in Stock & Market performance |  |  |
|  | Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline - maybe a Sat morning |  |  |
|  | Understanding /Applying various financial terms: "Book Value," "Cash Flow," Current Ratio, Quick Ratio, Peg Ratio |  |  |
|  | Stock Screening BI Weekly Emails |  |  |
|  |  |  |  |