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| Date & Time | Tuesday Jul 20 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

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| 07:00-07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Call to Order | Wilbert Nixon |
| 07:05-07:10 PM | Please file quarterly report into Stock Watcher Folder right after presentation. Identify which quarter and which year | Wilbert Nixon |
| 07:10-07:15 PM | Meeting Options: Survey Results | Baskar |
| 07:15-07:20 PM | Member withdrawal – Kent Billmeyer (per bylaws) | Gladys |
| 07:20-07:25 PM | Secretary’s Report   * Approval of Jun Minutes (posted in Bivio) | Maskey |
| 07:25-07:55 PM | **Education**: Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline(Bivio->Education Tab) | Sheryl |
| 07:55-08:20 PM | New Stock Presentation: Algonquin Power & Utilities Corp (AQN) | Patricia Onufrak |
|  | Stock Reports: No reports this month |  |
| 08:25-08:30 PM | Treasurer’s Report | Gladys |
| 08:30-08:45 PM | Decision: Buys and Sells | Partners |
| 08:45-08:50 PM | Member Questions about Investing in General: Send question to Amy (amy@tegwyn.com) | Experts will Answer |
| 08:50-08:55 PM | Upcoming Events and Announcements (***see below***) | Wilbert |
| 09:00 PM | Adjourn | Wilbert |

BI and Community Events & Announcements

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| Sat Jul 17 2021  10:00 AM - 02:00 PM | DC Chapter Annual Planning Meeting to be held at Bethesda,MD Open for Chapter Directors and Members of the DC Area Club. Onsite meeting. GTM will be available as well. |
| Wed Jul 21 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-jul |
| Sat Jul 17 09:15 AM | **AAII July Meeting**  **Speaker**:  Matthew Caruso, CFA, CM, President, Caruso Investments  **Topic**:  "Active Growth Investing"  [**https://aaiidcmetro.com/meetings.htm**](https://aaiidcmetro.com/meetings.htm)  **Cost: $10** |
| Mon Aug 2 2021  07:00 PM – 08:00 PM | **DMV Chapters presents: Digging into the BI Magazine Aug 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.  INVITE YOUR ATTENDEES  Registration URL  https://attendee.gotowebinar.com/register/1755956769755965964  Webinar ID  513-062-515 |
| Tue Aug 10 2021  07:30PM-09:00PM  (2nd Tuesdays) | Money Matters (Book Club)  Aug Title: **The Joys of Compounding: The Passionate Pursuit of Lifetime Learning**  **By Gautam Baid 2020, 438 p.**  The author, a highly regarded value investor, presents lessons from the greatest investors, philosophers, and scholars, and applies them to investing, business, and personal decision making. |
| Tue Aug 17 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: |
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| 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 |

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|  | Name | New Stock Presentation | Conduct MicNova Monthly Meeting | Conduct MicNova Planning Meeting |
| 1 | Patterson, Shervl | 6/15/2021 | 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 | ~~5/18/2021~~ | ~~4/20/2021~~ | ~~4/15/2021~~ |
| 11 | Nixon, Wilbert | 9/21/2021 | 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

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|  | 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~~ |
| 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 | Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline | Sheryl | 7/20/2021 |
| 11 | How to navigate and use Yahoo Finance as a source for stock ideas and analysis. | Jonathan | 8/20/2021 |
| 12 | Ratios using Price | Gladys/Sheryl | 12/21/2021 |
| 13 | Exploring the "Research" Tab in SSG | Arvind | 9/21/2021 |
| 14 | Different types of orders you can place with your broker (Limit, Market, Trailing, Stop Loss) | Amy | 10/19/2021 |
| 15 | 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 |
| 16 |  |  | 12/21/2021 |
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|  | 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 |  |  |
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|  | Understanding /Applying various financial terms: "Book Value," "Cash Flow," Current Ratio, Quick Ratio, Peg Ratio |  |  |
|  | Stock Screening BI Weekly Emails |  |  |
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