

# INVESTOR'S NEWS

*Celebrating 40 Years As A Chapter*

A PUBLICATION OF BETTERINVESTING, SAN DIEGO CHAPTER

NON-PROFIT • VOLUNTEER BASED • MEMBER DRIVEN

VOL 22 NO 6

[www.betterinvestingSanDiego.org](http://www.betterinvestingSanDiego.org)

Winter 2010

## New "Find-a-Club Program" launched

Is your club looking for new members that are already seasoned in BetterInvesting philosophy and methods? Our national organization is sponsoring and supporting a new Find-a-Club program to connect BI members who are looking for a club with a club that is looking for members.

This program is open to any existing club whose members all belong to BI---one of the benefits of membership. After the application process is completed, the club contact information is listed on the national website under the San Diego Chapter information. There it can be accessed by any BI member.

There is a link on our local website, [www.betterinvestingsandiego.org](http://www.betterinvestingsandiego.org), right on the home page that will take you directly to the Find-A-Club location on the national site after you sign in. There you can read and download a FAQs page that describes the program more fully, and also find and fill out the application form.

To navigate to the Find-A-Club location by yourself, sign in to the BI website. Then click Chapters (on the blue toolbar) and My Chapter. Under Links (on the left side) hit Find-A-Club.

If you have any questions or need any help, please contact Nancy Davis at [njdavis2@cox.net](mailto:njdavis2@cox.net).

## Is the recession over?

### Is now the best time to invest?

Want to know how to find **quality stocks**? Then you will want to attend our upcoming February 4, 2010 Education Workshops. These workshops will include topics on:

- How to use the Stock Selection Guide (the SSG).
- How to project future sales and earnings growth rates.
- How to determine price/earnings ratios.
- How to make Revenue-based Earnings Projections.

Workshops will also include teaching the fundamentals of Toolkit 6 (a software program for investors. Some of you are already using Toolkit 5. So you be updated on the latest version).

## Attention New Club Treasurers!

### Club Accounting Workshop

This class is presented annually, especially for newly elected Better Investing Club Treasurers. However, club members who are currently serving as club treasurers may also wish to attend this workshop as a refresher course.

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# FEBRUARY 4, 2010 WORKSHOPS

## CLUB ACCOUNTING

### NEW CLUB TREASURERS – THIS IS FOR YOU!

This class, presented annually, is especially for newly elected Better Investing Club Treasurers. The presentation covers three segments, providing essential information and tools for the treasurer with little or no experience with accounting requirements for investment club accounting.

**Part 1** covers the general concepts and requirements in club Accounting – the basics in what to do, and why.

**Part 2** features a look at the options of accounting software available, looking specifically at Club Accounting Online (CAO) and bivio. Other approaches are discussed, and links to sources of help are provided.

**Part 3** deals with auditing the club's books and preparing for tax reporting. After taking this course, the treasurer should be able to avoid the pitfalls of working in the dark, and will understand the importance of presenting essential reports to all club members.

Monthly tasks should be doable in as little as two hours and you will be ready to prepare necessary year-end IRS reports and the K-1 reports for each club member.

## FUNDAMENTALS OF TOOLKIT

What is the "Stock Selection Guide?" - SSG

Want to know more about the price / earnings ratio?

Want to learn how to project future sales and earnings growth rates?

Have you heard of "Toolkit" (a software program for investors)?

Want to find about more about "Revenue-based Earnings Projection?"

Hey! We have a **workshop** on these subjects.

The **workshop** will focus on the rationale for investing at least a portion of your savings in common stocks in spite of the recent market turbulence.

We will look at historic trends and the results of long term investing.

Next we will examine what to look for in good quality stocks, where to find and how to analyze the information, and briefly how to apply it to an investment portfolio. Emphasis will be placed on the proven successful methods and philosophy developed by BetterInvesting.

## SSCG Meetings not same as Workshops

It has come to the attention of the BI Board of Directors that there is confusion regarding our educational sessions. As the economy has played havoc on the Nation, it has affected us as well. We've had to reduce the number of sessions we hold each year and change the venue of our workshops and fees. We are hoping the following explanation will help clear up this confusion. If not, please call our hotline at 760.331.8051 and ask questions.

### **SSCG Meetings (Stock Study Computer Group)**

This is an informal, interactive meeting focusing on the analysis of specific companies. Occasionally we will have a guest speaker. The SSCG meetings are being held once a quarter at the Lawrence Family Jewish Community Center. The cost is \$5 at the door.

### **Workshops**

Workshops are professionally compiled and designed to educate attendees on a specific topic. These workshops are presented by members and guests with advanced expertise related to the topic of the workshop. Handouts will be given and there will be Q&A periods at the end of each session.

Online registration is \$10, which does not include a nominal processing fee (online registration will guarantee you handouts), or you can register at the door for \$15. We only have two workshops scheduled so far this year and they will be held in the evening at the Lawrence Family Jewish Community Center (these sessions were formerly held on the weekend at a local college campus).

Watch for detailed email notifications of all Chapter activities with an embedded link to take you directly to our online registration site.

**SAVE THE DATE!**

March 4, 2010

We will have a guest speaker  
from Qualcomm

## 2009-2010 Calendar

| Month      | Date  | Day          | Event                             |
|------------|-------|--------------|-----------------------------------|
| <b>Sep</b> | 12    | Sat          | Annual Meeting.                   |
| <b>Oct</b> | 8     | Thurs        | Board Meeting                     |
| <b>Nov</b> | 3     | Thurs        | SSCG                              |
| <b>Dec</b> | 3     | Thurs        | Value Investment Workshop         |
| <b>Jan</b> | 7     | Thurs        | Board Meeting                     |
| <b>Jan</b> | 16    | Sat          | Board Strategic Planning Retreat  |
| <b>Feb</b> | 4     | Thurs        | Club Acct. & TK6 SSG              |
| <b>Mar</b> | 4     | Thurs        | QCOM @SSCG Meeting                |
| <b>Apr</b> | 1     | Thurs        | Board Meeting                     |
| <b>May</b> | 6     | Thurs        | Class, TBD                        |
| <b>Jun</b> | 3     | Thurs        | SSCG TBD                          |
| <b>Jun</b> | 10-13 | Thurs to Sun | BI National Convention, St. Louis |
| <b>Jul</b> | 8     | Thurs        | Board Meeting                     |
| <b>Aug</b> | 6- 8  | Fri to Sun   | InvestEd Convention, Baltimore    |
| <b>Sep</b> | 11    | Sat          | Annual Meeting.                   |