

# San Francisco Bay Area Chapter BetterInvesting

NON-PROFIT · VOLUNTEER BASED · MEMBER DRIVEN

[www.betterinvesting.org/sanfran](http://www.betterinvesting.org/sanfran)

## Investing Educational Workshops

Saturday, November 3 - 8:30 am to 12:30 pm

Mills College, Lucie Stern Hall 107, 5000 MacArthur Boulevard, Oakland

Registration and Schedule

Early Registration: \$30 must be received by **October 21, 2018**  
Regular Registration: \$35 registration begins **October 22, 2018**  
Special Club Registration: \$25 per person, 3 or more from same club

*To qualify for the club discount, registrations must be submitted together and be received by October 21, 2018. use a separate form for each person or register online at Eventbrite.*

**Bring a friend! Register with a non-BI member at the same time only \$20 each person. Save off the regular registration fee of \$35. (Mail-in registration only)**

*Continental breakfast included*

Online & credit card registration available at: <https://edday-2018.eventbrite.com>

### SFBA Chapter **BetterInvesting** Educational Workshop Mail-in Registration Form

8:30 – 9:00	Registration & Continental Breakfast	
9:00 – 9:50	Looking for Tomorrow's Winners Craig Braemer	The Stock Selection Guide: The Basics Part I Joanne Willcox
10:00 – 10:50	Forecasting Growth Harriet Chan	The Stock Selection Guide: The Basics Part II Henry Gold
11:00 – 11:50	BetterInvesting Website Joanne Willcox and Kweli Lewis	Stock to Study Craig Braemer and Jim Willcox
12:00 – 12:30	Model Club Portfolio Review and Door Prizes	

**PLEASE PRINT CLEARLY**

Mail this completed form and check (payable to SFBA Chapter NAIC) to:

**SFBA BetterInvesting Educational Workshops**  
c/o Vivian Thomas  
21 Hillcrest Court  
Oakland, CA 94619

Online and Credit Card Registration:

<https://edday-2018.eventbrite.com>

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

*For questions or further assistance with registration, contact Vivian Thomas (510) 842-8989 or [vivianne@yahoo.com](mailto:vivianne@yahoo.com)*

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## Workshop Descriptions

### **Looking for Tomorrow's Winners** (Craig Braemer)

How to go about finding small and medium sized companies is one of the most frequent requests we get from members when we make club visits. During this class we will focus on two processes that will help you discover these companies; first we will use the BetterInvesting SSG online screening tool and then we will learn to leverage the knowledge of professional mutual fund managers, individuals who spend their lives looking for the next great stock idea, by sharing a process that allows individual investors to regularly track professional trades. Tomorrow's winners will have started as small/medium sized stocks, making a case for putting these two processes to work for you.

### **The Stock Selection Guide: The Basics, Part I & II** (Joanne Willcox and Henry Gold)

These workshops will help you gain understanding of what one looks for when evaluating a company for potential investment. Using the online SSG, the class will look at each section of the SSG as well as the key judgment areas; future high and low PE, selected low price, earnings per share growth, and how they all work together to help identify good companies at reasonable prices. The five sections of the SSG will be explained and we will discuss why each section is important while demonstrating how to access data sources that will help you complete your SSG.

### **Forecasting Growth** (Harriet Chan)

The SSGPlus and the CoreSSG online analysis tools have 5 different research reports that provide estimates of long-term growth. Couple these with ValueLine reports and your brokerage firm resources, estimates for long term revenue and earnings growth has just gotten a lot easier. Harriet will guide you through the process for getting sales and earnings estimates from the SSG online analysis tools.

### **BetterInvesting Web Site** (Joanne Wilcox and Kweli Lewis)

How do I get from here to there? When I get there, what is there? Come and join us for a deep dive into the BetterInvesting web site. Let us help you streamline your search for what you want to find. Missed a TickerTalk presentation? Let's find it. Want to know what events are happening in your chapter? Want a quick link to earnings reports and analysts estimates? We'll take you there.

### **Stock to Study** (Jim Willcox and Craig Braemer)

With Jim and Craig, attendees will complete a Stock Selection Guide (SSG) and learn how to handle the various judgment sections of the SSG. This is an interactive workshop with lots of practical discussion about filling out an SSG. Attendees will be able to put this new knowledge to work right away.

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