



Club Visit Request Form

Date: _____

Club Name: _____

Number of Members: _____ BetterInvesting Club Number: _____

Month and Year Organized: _____ Use Club Accounting? Yes _____ No _____

Current Club Contact: _____

Phone: _____ Email: _____

Mailing Address: _____ City: _____ Zip Code: _____

Indicate Topics of Interest: _____

Some Topic Examples: How to form an investment club, general guidance for new clubs, resources from BetterInvesting and your local chapter, book keeping and accounting for adding a member, partial or full withdrawals, when a member dies, etc. Every new or existing BetterInvesting club is entitled to one free hour visit per calendar year.

Meeting Information: Date: _____ Time: _____

Location: _____

If your club wishes training for: Stock Selection Guide (SSG), Stock Comparison Guide, Portfolio Management, Online Accounting, SSG Core or SSG Plus online. The following are guidelines for personalized visitor classes.

If a club wishes a visit that is "to teach a class or concept" the fee per attendee is required. Classes to clubs are priced at \$5.00 per hour with a minimum of 2 hours per person and a minimum of \$50 for a 2 hour class. (A club of 10 people would pay \$100.00 for a 2 hour class). The money would be payable to the Channel Islands Chapter, not the Director conducting the training.

Yes, our club would like a class on _____

We understand the above guidelines. Presiding Member _____

An application for a visit is required 30 days prior to the visit. Send to: Registrar, Channel Islands Chapter BetterInvesting, P.O. Box 3418, Camarillo, CA 93011-3418. **Questions?** (805) 482-6144.