

BRINGING EDUCATION DIRECTLY TO YOUR CLUB

“CLASSES TO GO”



OFFERED BY

ST. LOUIS CHAPTER
BETTERINVESTING™

CLASSES TO GO

To better accommodate our membership and to broaden club education opportunities, the St. Louis Chapter is offering a program called “Classes To Go”. The educational benefits of having a majority of your club members hear the same message at the same time is priceless. Your club sets the time, provides the space and selects a topic from our available choices. These classes may also be arranged for *any* small group.

ONE HOUR CLASSES

\$15 per student/ \$75 minimum

- **General Topics**
 - How To Start An Investment Club
 - How To Run An Investment Club
 - The Basics of Investing
 - Three Important Things Every Investor Should Know
 - Getting Acquainted With The Value Line Report
 - Value Line Quick Analysis & Comparison Guide
 - Stock Check List : The Beginners First Step For Evaluating A Stock
 - What To Include When You Present A Stock to Your Club
 - Introduction To Annual Reports
 - Bank Stock Analysis For Beginners
 - Warnings & Red Flags Beyond the SSG-The Other 20%
 - Getting The Most Out of Toolkit
 - Personalized Stock Study
- **Stock Selection Guide**
 - How To Read & Understand the Stock Selection guide
 - Making Judgments: Section 1
 - Making Judgments: Section 2 (Management)
 - Making Judgments: Sections 3 (P/E), 4 & 5
 - Spotting Red Flags On The Stock Selection Guide & Beyond
 - Understanding the P/E Ratio & Its Variations
- **Portfolio Management**
 - When To Sell
 - Portfolio Tune-Up & Repair
 - Using Toolkit 5 Portfolio Management Tools (Defensive/Offensive Strategies)

We can also build a “custom” class, although we may have to charge a higher fee, depending on the time and materials required. We will do our best to accommodate all of your educational needs.

To schedule a class or for more information, please contact:

Education Chair..... Brian Hayek (636-227-4260) or hayekbg@charter.net

Registrar.....Judith Durham (636-227-2218) durham.judith@gmail.com

IL Area Chair.....Candace Baker (618-624-8581) candaceb@charter.net

CLASS DESCRIPTIONS

GENERAL TOPICS

- **HOW TO START AN INVESTMENT CLUB**
- **HOW TO RUN AN INVESTMENT CLUB**
- **THE BASICS OF INVESTING** – A beginners guide of things to consider when building a portfolio. Includes the explanation of the terminology.
- **THREE THINGS EVERY INVESTOR SHOULD KNOW**
 - The Relationship of Sales, Earnings & The Price of the Stock
 - The Difference Between Important Information & Noise
 - Why We Look at P/E
- **GETTING ACQUAINTED WITH THE VALUE LINE REPORT** – An overview of a Value Line company report, including the location of data required for an SSG and information useful for SSG judgments.
- **VALUE LINE QUICK ANALYSIS & COMPARISON GUIDE** – A guide through a checklist of 10 criteria found on a Value Line company report which will help you identify a quality company worth your time to complete an SSG. Also includes a look at how to compare these items for several companies side-by-side.
- **STOCK CHECKLIST: THE BEGINNERS FIRST STEP FOR EVALUATING A STOCK**
- **WHAT TO INCLUDE WHEN PRESENTING A STOCK TO YOUR CLUB**
- **INTRODUCTION TO ANNUAL REPORTS**
- **BANK STOCK ANALYSIS FOR BEGINNERS**
- **WARNINGS & RED FLAGS BEYOND THE SSG – THE OTHER 20%** - Learn about a number of easy-to-check warning signals, the so-called “Other 20%”, that are not on the Stock Selection Guide. Useful information can be found in Value Line, the balance Sheet, cash flow statement, and annual report.
- **GETTING THE MOST OUT OF TOOLKIT** - Learn how to utilize Toolkit’s many helpful features for completing an SSG and doing a Stock Study. The class will also cover some undocumented features of Toolkit.
- **NEW! PERSONALIZED STOCK STUDY** – Have a stock in your club portfolio that you wish you understood a little better? Let us prepare and present a stock study for your club including a discussion of SSG judgments.

STOCK SELECTION GUIDE

- **HOW TO READ & UNDERSTAND THE STOCK SELECTION GUIDE** – A class for those club members who do not prepare or understand a Stock Selection Guide (SSG) and possibly those who need a refresher course. This course will explore the basic purpose of the SSG and highlight the most important information to take away from this stock study tool.
- **MAKING JUDGMENTS: SECTION 1**
- **MAKING JUDGMENTS: SECTION 2 (MANAGEMENT)**
- **MAKING JUDGMENTS: SECTIONS 3 (P/E), 4 & 5**
- **SPOTTING RED FLAGS** – Learn to recognize trouble spots that need to be investigated on the SSG. Understand what red flags are signaling, helping you avoid costly mistakes.
- **UNDERSTANDING THE P/E RATIO & ITS VARIATIONS** - Learn what the P/E ratio is telling you and how it is used to identify a stock selling at a fair value, avoiding “irrational exuberance”. Relative Value & the PEG ratio will also be discussed.

PORTFOLIO MANAGEMENT

- **WHEN TO SELL** – This class will provide “Buy & Hold” investors with tools to make “sell” decisions in a logical, rational manner. Common psychological traps that are harmful to your wealth will be discussed, along with tips on how to recognize and avoid them.
- **PORTFOLIO TUNE UP & REPAIR** - Clubs are often searching for someone from outside their club to examine and candidly comment on the holdings. We will study the stocks in your portfolio, both individually and as a group, and identify any problem areas. Better Investing portfolio management tools will be used and explained.
- **USING TOOLKIT 5 PORTFOLIO MANAGEMENT TOOLS** - We will discuss ways to monitor your portfolio to determine if the reasons that led you to buy a stock are still in place. Using PERT reports and the “Alerts” in Toolkit 5, we will identify underperforming companies and those that are overvalued and may need to be replaced in order to reduce risk and increase your portfolio’s return.

ALSO AVAILABLE.....CLUB VISITS

We would be happy to send a Director to one of your club meetings. We are available to discuss the Better Investing philosophy or any problems that your club may be encountering. For more information on Club Visits please contact Ruby Lawrence at RL82434@prodigy.net (636-394-7186)

WHAT ARE YOUR RESPONSIBILITIES?

1. Reserve a room which can comfortably seat all your participants at tables with adequate room for the teacher and helpers.
2. Make sure the room has a table that the instructor can use for a laptop computer & projector.
3. Provide a large (min. 6 ft square) screen or a light colored blank wall to project PowerPoint images.
4. Notify us of the location (with directions) at least one weeks in advance.
5. Provide the number of your participants at least 4 days before event so the instructor can prepare an adequate number of handouts.
6. Make sure the room will be open at least 30 minutes prior to the start of the class so we can set up.
7. You are committed to \$15/attendee or a minimum payment of \$75. **Payment should be made on the day of the class by a club check or individual checks made out to: Better Investing (NAIC), St. Louis Chapter.**

The St. Louis Chapter will provide the teacher, handouts and audiovisual equipment.

CONTACT INFORMATION

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