

# Our Not-So-Boring Times

February, 2018

For so long there has not been much to do about our investments. They just kept going up, so why bother. Of course, it was also harder to find something to buy following our BI principles, so that was another “why bother”.

Well, back in 1964 Bob Dylan sang, “Times, they are a changin’”. It’s another time, but for better or worse, we again have to pay attention. For that reason, I remind individual investors and club members that the Directors of the BetterInvesting Wisconsin Chapter are available to you in a variety of ways.

## Education is what we do

That can mean answering a question, explaining a process or evaluating investing decisions.

We offer Education Days several times a year and in different parts of the State for all members and guests.

### FALL 2017 EDUCATION DAYS



Classes were held in Milwaukee on Saturday and Madison on Sunday. Carol Theine, chairperson of the BI Volunteer Advisory Board and a director of the Puget Sound Chapter, taught a class titled “When to Sell” and another “The importance of Valuation Ratios”. Bobbi Kincaid, a BetterInvesting Region Manager, and our own Deane Jaeger taught “How to Prepare a Stock Selection Guide” and “Following Your Stocks”. Finally, all the directors and the audience enjoyed “Talking Stocks” which is always lively. There will be more Education Days planned for Fall 2018.

### SPRING PROGRAM FOR RETIREES

On March 14th, from 9:30 to 11:25, the chapter will offer a class titled, “What is an Investment Club and How Do You Start One?” through the Learning In Retirement (LIR) program at Waukesha County Technical College at their Waukesha Campus at 327 E Broadway. The class is \$5.00, but attendees must be members of the Learning In Retirement Program through WCTC and the yearly membership is \$50.00.

## MONEY SMART WEEK IN WISCONSIN

We partner with other organizations. One of our big projects is presenting classes about investing during **Money Smart Week** April 21-28, 2018. **Money Smart Week** is a partnership between the Federal Reserve Bank of Chicago and the American Library Association. It is a public awareness campaign to help consumers better manage their personal finances by offering thousands of free classes and activities nationwide to consumers of all ages. These events are carried out by financial institutions, government agencies, schools, libraries and non-profit groups such as BetterInvesting. There is no selling allowed so there is no pressure.

We will present investing programs in 5 locations this year:

- Tuesday, April 24, 6:00pm Germantown Library at N112W16957 Mequon Rd, Germantown. “Understanding the Stock Market”
- Wednesday, April 25, 6:00pm Capitol Library at 3969 N 74th St, Milwaukee. “Understanding the Stock Market”
- Thursday, April 26, 2:00pm Washington Park Library at 3131 N Sherman Blvd, Milwaukee. “Starting an Investment Club”
- Thursday, April 26, 6:00pm Hildebrand Memorial Library at 1033 Wisconsin Ave, Boscobel. “Understanding the Stock Market”
- Friday, April 27, 2:00pm Zablocki Library at 3501 W Oklahoma Ave, Milwaukee. “Understanding the Stock Market”

If you have family or friends who are hesitant to commit to a group, a library is a comfortable place to talk about money and other financial issues. We are happy to talk with anyone who wants to attend. Programs are free with no registration involved. SPREAD THE WORD.

### We work with clubs.

1. **We deliver Anniversary Certificates** to clubs that are celebrating any 5 year anniversary. In 2017 there were 22 Wisconsin investment clubs with anniversaries ranging from 5 years to 45 years.
2. **We visit clubs that reach out to us asking for a visit.** We evaluated portfolios; explain the on-line tools that have become more sophisticated but, for that reason, are so much more useful; focus on specific topics like finding small cap stocks, making better Stock Selection Guide (SSG) decisions, knowing when to sell; and we trouble shoot problems within your group.
3. **We facilitate connections between members looking for a club to join and clubs looking for new members with the Visit-A-Club Program.** Sometimes it is between people that live within blocks of each other but are unaware of their BI connection. Sometimes the search is much wider.

## 2017 CLUB ANNIVERSARIES

Chapter directors enjoy visiting clubs to deliver these handsome certificates and to meet with club members. We have presented a number of programs during these visits. These programs include:

- Portfolio Evaluations
- Getting the Most Out of Your BI Membership
- How to Use the On-Line Stock Analysis Tools
- Investment Club Operation Issues

Below is a list of 2017 Anniversary Clubs. If your club is listed and you have not yet scheduled a visit, please notify us at [contact@wisconsin.betterinvesting.net](mailto:contact@wisconsin.betterinvesting.net).

| Club                            | Years | Club                          | Years | Club                      | Years |
|---------------------------------|-------|-------------------------------|-------|---------------------------|-------|
| • JPR-Son Investment club       | 5     | • FFW Investment Club         | 20    | • Money Makers            | 25    |
| • Runaway Girls                 | 15    | • Mad City                    | 20    | • Gold Medal              | 25    |
| • Dividend Divas                | 15    | • Red Fox Limited Partnership | 20    | • Jones Girls             | 25    |
| • Friends in Fortune            | 20    | • Working Women               | 20    | • Big Wheel Investors     | 30    |
| • Financial Foxes of Fox Valley | 20    | • Integrity Investment Group  | 20    | • Capital Growth Group    | 30    |
| • Women Investing for Profit    | 20    | • Madison Market Mavens       | 25    | • Allen-Bradley Investors | 35    |
| • Fortune Faithful              | 20    | • We Vest                     | 25    | • 4M                      | 35    |
|                                 |       |                               |       | • Investments Unlimited   | 45    |

### CLUB NEWS



Left to right: Mary Ann Duebner, Patty Pohlmann, Bill Pohlmann, Charlene Peterson, Evie LeClair, John Sowinski.  
Absent are Cheryl Duchow, Ann Shebesta and Carol Glaeser

### Friends in Fortune Investment Club Celebrates 20 Year Anniversary

Since the club's chartering in 1997, its members have come together to learn, share investing experiences and help each other become more successful investors. Today, the **Friends in Fortune Investment Club** (FIFIC) has five meetings a year in January, March, May, September and November. Our members come from different industry backgrounds such as public service, banking, pharmaceutical, financial, insurance, day trading, legal and nursing. We have made new connections along the way and now enjoy long-term friendships and the self-confidence that comes from understanding stocks. We are making money and having fun!