

# *Better Investing* Pittsburgh Chapter **Portfolio “Tune Up” Questionnaire**

Has your club been around for a while? Do you enjoy reading the *Repair Shop* column in the BI Magazine?

Would you like to know if you are following the Better Investing Principles?

If the answer is YES to any of these questions then you may want to take advantage of a program offered by the local Better Investing Pittsburgh Chapter. We offer a chance for your club to have your portfolio reviewed by our seasoned team of volunteers who will be glad to assess your portfolio diversification and level of risk. With your additional input, the team can also comment on your stock analysis techniques and purchase behavior.

**Please NOTE** that the analysis of your portfolio and preparation for a presentation **can take several weeks**. Please allow sufficient time for us to plan and prepare, as well as coordinate with you the time and date of your meeting.

If you would like to take advantage of this program, please complete this form and send to:

**BetterInvesting Pittsburgh Chapter  
113 Fox Chase Court  
Cranberry Twp., PA 16066**

You can also email: [contact@pittsburgh.betterinvesting.net](mailto:contact@pittsburgh.betterinvesting.net) for answers to questions that you may have.

## **Club Information**

Name \_\_\_\_\_ Year Started \_\_\_\_\_  
Contact Name \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Contact Email \_\_\_\_\_ Meeting Location \_\_\_\_\_  
Number of Club Members \_\_\_\_\_ Age Range of Members \_\_\_\_\_

## **Stock Study Information**

Does the club use the Stock Selection Guide frequently? \_\_\_\_\_

Where does the club get company data / information for analysis? \_\_\_\_\_

Which software package does the club use to create the SSGs? \_\_\_\_\_

Describe the investment philosophy and goal of the club \_\_\_\_\_

\_\_\_\_\_

Describe the decision making process of the club \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Stock Tune-Up Information

**Please Include:**

- Your most recent Club Accounting or Online Club Accounting portfolio printout or
- A copy of the current Stock Selection Guides
- Any information showing stocks held, purchase dates, purchase price, and number of shares held

If you do not have the above information in a club accounting program or do not have the original SSGs for the stocks, please complete the table of information on the next page, before returning it.

## Club Portfolio Information

If you do not have the portfolio or stock information in a club accounting program or do not have SSGs for the stocks, please complete the table of information before returning it.

**Please NOTE** that the analysis of your portfolio and preparation for a presentation **can take several weeks**. Please allow sufficient time for us to plan and prepare, as well as coordinate with you for the meeting.

Ticker Symbol	Company Name	Current # of Shares	Date of First Purchase	Price per Share at First Purchase

**If necessary, use an additional sheet to explain your investment philosophy or decision-making process or to list additional stocks in your portfolio.**

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