

# IT'S TIME TO RE-CHARGE

## Better Investing Wisconsin Chapter Fall Newsletter

As the summer heat dissipates and fall colors appear we want to review what your Wisconsin Chapter has been doing over the summer months and to share what lies ahead.

The primary purpose of the BetterInvesting Wisconsin Chapter is to assist members and clubs to become better investors. The Chapter has been very active in providing club visits which have been initiated by a club. This visit offer is open to every BI club in good standing. One of the primary requests is to perform a portfolio review. During the review we make suggestions, but not recommendations, on how to make a club's portfolio more diversified. Another popular program has been an overview of how to use the BI Online Tools for researching and preparing SSGs. Presentations were made to **Ca\$h, Mequon Money Makers, Girls Exceeding the Market (GEM), Upside Investment Club, Madison Tech Investors, and Appleton Area Winners.**

## Investment Clubs Celebrating their Anniversary

One of our favorite tasks is to present anniversary certificates to clubs celebrating 5 year anniversaries. This spring and summer we presented certificates to **Pure Strategies (15 years), FFW Investment Club (20), Partners in Growth (20), Silver Lake Investment Club (25), We Vest (25), Dollar Diggers (45), and Odd Lot Investment Club (50).** Clubs are not static organizations. They take time and effort to maintain. We congratulate you for your hard work.

## Notes from BINC 2018

In May of this year your Board attended additional training at the BetterInvesting Annual Convention in Orlando, Florida. The annual convention is always a good time to get refreshed and network with other chapters throughout the United States. You come away with a myriad of ideas. Here is one director's musings about BINC 2018.

### Submitted by Bob Johnson, Wisconsin Chapter Director from South Milwaukee

As a first-time attendee at BINC I was impressed with how well it was organized starting with the registration website. It was fast and easy and I got a quick confirmation. The sessions on Friday, Saturday, and Sunday were divided into 50-minute sessions which I liked. Classroom monitors and time keepers kept things moving smoothly. There were people in the hallways to help find a room or answer a question. A Corporate Expo was set up with representative from different companies available to answer questions about their company in hopes of getting you interested in investing. There were many drawings, raffles, and other fun activities. I have attended many webinars of *Ticker Talk*, *Stock Up*, and *Toolkit 6*. It was great to

have these people at the convention and see and listen to them in person. I actually had breakfast and conversation with Kamie Zaracki (CEO and President of BI) at my table. I attended presentations by Suzi Arzberger and Ann Cuneaz, both of whom are on the staff at BI. The one item that stuck in my mind from Ann was the idea of using the Online Tool Notes in the SSG for keeping records.

Reading *Repair Shop* by Scott Horsburgh in the magazine and then listening to him was a delight. He gave us good guidance as to what to look for while analyzing bank stocks. Seeing Ken Kavula and Carol Theine (a Wisconsin lady), presenters on many webinars, was also a plus.

I try to join Doug Gerlach's *Toolkit 6* webinars on the first Tuesday of the month. Again, it was enjoyable to see him live. I learned from people new to me such as Kim Butcher, Bob Houle, Cy Lynch and Nick Stratigos. Cy turned the negative into a positive. Nick had good and bad reasons to sell and advised us to write down, before hand, the reasons why we acquire a stock and use it later as a reference.

Dan Boyle from Investor Advisory Services did a good job of describing his company and how they rank stocks. He also gave some recommendations.

I think you can tell I enjoyed BINC 2018. I highly recommend it. You will learn a lot and meet a nice group of investors.

## 2019 BetterInvesting National Convention Special Pricing

### Don't Wait

The 68th annual BetterInvesting National Convention (BINC) will be held May 16-19, 2019 in Chicago, Illinois with the theme **Share the Wealth**. BINC is the premier investment education event where you will sharpen your investing skills, learn new strategies and tools to increase your investing satisfaction and even walk away with a few investing gems to add to your portfolio. Your favorite instructors along with a few "rising" star instructors will be there to **Share the Wealth** of their investing expertise with you. Renowned financial technician **Ralph Acampora** will be our keynote speaker and will share his views on the stock market. You can follow Ralph's views on the stock market via Twitter at @Ralph\_Acampora.

The special reduced pricing to attend 2019 BetterInvesting National Convention (BINC) will expire soon. Register for BINC before Dec 2 and you will save 25% off the regular price. To register just click on [2019 BINC Registration](#) to reserve your spot at BINC. Also remember to make your hotel reservation at the Chicago Marriott O'Hare, as there is an extraordinary demand for hotel rooms during our convention. The special BINC room rate is just \$129 per night and parking is a reduced rate of \$12 per day. Make your reservation at [Hotel Reservation](#). What are you waiting for — register today for BINC and save!

You can make a difference in someone's financial future by **Sharing the Wealth** of your knowledge of investing and inviting them to attend 2019 BINC. Someone made a difference in your life by sharing the mission of BetterInvesting. Who are you going to influence and invite to 2019 BINC?

**Partners in Growth**



Left to right: Mike Marquardt, Tony Geliche, Andy Arena, Bill Curran, Greg Pawell, Doug Poff, John Schingen and Jeff Milkie.

Partners In Growth was started through business relationships associated with the trucking industry. From that original focus, membership has expanded to very diversified occupations. The common thread is the desire to become better investors with BetterInvesting as the guiding light. We're not always working; note the friendly meeting place.

**Pure Strategies**



Standing left to right George Lockwood, Leo Gonnering, Gerhard Haggemueller, Catherine Oberle-Ladd, Richard Slade and William Stonecipher.

Seated left to right: Elaine Gust, Pat Koll, Marvin Conrad and Betty Gonnering

Pure Strategies was formed March 28, 2003 in West Bend. The "Pure Strategies" name was selected in the hope that we would gain the knowledge to become successful individual investors. We had ten founding members which grew to 17 by

December of that first year. In fact, three of these first-year members are still active. Pure Strategies has been a BI member since October, 2006, but even before that we followed the NAIC suggested methodology. Over the years some of our members have participated in the NAIC classes and attended Milwaukee area Investors' Fairs. What we have learned through these BI experiences has been helpful because many of us had not been exposed to the sound principles of the stock selection process. We needed to learn how to research and evaluate for ourselves instead of relying solely on the advice of a stock broker. We used to research stocks using the library's ValueLine and manually completed the SSG forms. We now use the online SSG for our work.

Interestingly, our first three stock purchases were made on the auspicious date of Friday the 13<sup>th</sup> in June, 2003. Our portfolio after 11 months included 14 stocks and we prospered. We presently hold 15 mostly large cap stocks.

### Looking for a Few Good Men and Women

The Wisconsin Chapter is on the lookout for a few good men and women who will volunteer to help reach out to our vast membership and broadcast our missions to educate and assist fellow BI members. Being a Board Director is not a financially rewarding, but being able to educate and assist a fellow BI member to be a better investor is extremely rewarding. We meet monthly at the Brookfield Library; out of town directors join us by GoToMeeting.

For more information contact John Schingen at [jrschingen@gmail.com](mailto:jrschingen@gmail.com) or 414-254-2099.

### Wisconsin Chapter Board of Directors

The Wisconsin Chapter's monthly meeting is 7:00pm on the third Wednesday of the month at the Brookfield Library in Brookfield, Wisconsin. As a BI member you are welcome to attend either in person or via the internet. Shortly we will be developing the Chapter's activities and club visits for the coming year and it is always good to receive ideas from our members. Would you like to have a club visit for a portfolio review or learn how to analyze stocks, use the online Stock Selection Guide or make full use of your BI benefits? Did you know that as a member of BetterInvesting you are entitled to a tremendous discount for copies made at Office Max-Office Depot?? This is just one of the many benefits of your BI membership.

Learn more about the Wisconsin Chapter or contact one of our Directors click on <https://new.betterinvesting.org/wisconsin>.

John Schingen  
Deane Jaeger  
Michele Rinka