

NEWSLETTER

Vol. 31 No. 2

Winter/Spring 2019

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INVESTOR EDUCATION WORKSHOP

Presented by KC BI
April 27, 2019

8:30 a.m. to 2:30 p.m.
KU Edwards Campus

12600 Quivira Rd.
Overland Park KS

Lunch Provided
Door Prizes

\$35 for NAIC/BI members using member number after the hyphen on *BetterInvesting Magazine* label; \$40 for non-members; \$45 for registration at the door. Register on the local website: www.betterinvesting.org (p. 9)

REGISTER NOW

Classes Winter/Spring

Enroll at the local website: www.betterinvesting.org as shown on p. 9. Members receive a discount by using the member number after the hyphen on the *BetterInvesting Magazine* label. **Out of town** classes and local contacts are listed on p. 3. The KC BI website shown at the top of p. 9 contains links to other Chapter information.

INVESTOR EDUCATION WORKSHOP **April 27, 2019**



The Spring Investor Education Workshop presented by the KC Area Chapter of BetterInvesting will be held at KU Edwards Campus in Overland Park on April 27 from 8:30 AM to 2:30 PM. Craig Braemer is the featured speaker and is a BetterInvesting Director in the San Francisco Bay Area Chapter. Craig has been investing for about 40 years and while recently retired, he still works in the financial services industry and has several designations like the Chartered Financial Analyst (CFA) and the Certified Financial Planning designation (CFP®). His primary interest outside of investing includes going to SF Giants baseball games, Disneyland, family trips and playing soccer.

Presentation Topics:

- **Improve Your Investing by Looking for Small Stocks**

Finding small and medium sized companies is one of the biggest challenges an investor faces. The discussion will review two processes. First, using BetterInvesting Screening Tools in the SSG Plus Online Tools and then second, leveraging the professional investor (Mutual Funds) who spends their life looking for the next great idea. A process that allows you to track professional trades on a regular basis will be shown.

- **Improving SSG Success with Moats, SWOT and 5 Forces!!**

This is a class that helps investors think beyond just the SSG by looking for quality companies and thinking about the forces that help maintain and improve Section 2 of the SSG. The internet will be used to find supporting information of these concepts.

- **Finding Quality Stocks by Evaluating Management**

Discuss why stock quality is important, from why Warren Buffett thinks quality is very important to BetterInvesting's belief that focusing on quality is a good way to invest over time. Section 2 of the SSG is so important to help identify quality management.

- **Retirement Planning for All Ages**

This class will present ideas for retirement planning over the years and steps to consider as retirement gets closer. Topics will include asset allocation from the time you start work, reviewing it each decade until approaching your retirement date. Discuss why the asset allocation can change over time and when it should change. Consider your current retirement plan and time horizon in retirement.

Refreshments and a box lunch will be provided. During the workshop participants will have an opportunity to discuss stocks of interest for a rapid fire look at an SSG and receive commentary from BI directors and Craig. Door prizes will be awarded throughout the session.

Increase Your Investment Knowledge with these Classes Basic Investing, SSG Classes and Workshops

The Kansas City Chapter of BetterInvesting™ again will use BetterInvesting software to teach the basic fundamentals of investing, as well as how to use the Stock Selection Guide (SSG). Emphasis is on understanding the SSG, visiting Internet research sites, judgment, and importing data using Online Premium Service and *StockCentral*. All SSG classes are progressive and require you to have an understanding of the information in the previous class. A printed PowerPoint® handout of each class presentation will be provided. All handbooks will be available for purchase at SSG I, II and III classes for \$15 or may be purchased online before classes.

How to Register:

- See p. 9 of the newsletter to learn how to register for any of these classes on www.betterinvesting.org
- Registration must be completed 48 hours in advance of the class to receive the posted registration fee (see p. 8 for class fees). \$10 additional fee for registration at the door.
- **Please check weather cancellation policy on p. 8 of this newsletter.**
-

Basic Investing: For those new to investing and who have minimal personal investing experience. Learn the basic fundamentals of investing, terms, ratios, understanding Value Line reports and completing the First Cut stock study on a company. The green Stock Selection Handbook, a \$15 value, will be provided at no additional cost to all Basic Investing participants.

Feb. 9, 2019 Mazuma Credit Union

9:30am –12:30pm 7260 W. 135th St., OP KS 66223

SSG I: For those who understand basic investing terms. This class emphasizes how to evaluate the fundamentals of a growth company, adding judgment using suggested research sources, and projecting future growth, utilizing BI Online Tools. SSG I is also for those who want to brush up on understanding the SSG.

Feb. 23, 2019 Mazuma Credit Union

9:30am –12:30pm 7260 W. 135th St., OP KS 66223

SSG II: Building on the knowledge of SSG I, this class covers selecting a good price to pay for the company, understanding total return and how the “buy” price affects total return. Learn to use all features of the Online Tools, including screening for new companies to consider for investment. Also, the next step for those who attended SSG I as a refresher class in understanding the SSG.

Mar. 9, 2019 Mazuma Credit Union

9:30am –12:30pm 7260 W. 135th St., OP KS 66223

Treasurer’s Workshop: Teaches accounting concepts and responsibilities of the club treasurer. Also includes administration topics such as the importance of a strong partnership agreement and bylaws that can be taken back and shared with the club. Software used for the workshop includes *Online Club Accounting* and *bivio*. Cost of the session is \$15. Lunch on your own.

Session scheduled by appointment only.

Offered in the Kansas City area from 9:00 a.m. to 4:00 p.m. on a Saturday.

To arrange a Kansas City area session, contact Dennis Boatright at drboatright4@gmail.com

KC Chapter Area Programs Outside Kansas City

LEAVENWORTH, KANSAS

Contact Al Mueller: alcmueller@earthlink.com

Classes are scheduled from 8:30 a.m. to 12:30 p.m. at **Fort Leavenworth** in the Armed Forces Insurance Conference Room, 655 Biddle Ave.

Visitor access to Ft. Leavenworth: Allow 10-15 minutes to process through Visitor Control Center. The VCC is located north of Metropolitan Ave. & Hwy 7/73. Driving north on 4th St./Hwy 7/73, proceed through the Metropolitan intersection and drive to check in at the station. It will take a couple minutes to run your driver's license through NCIC-III System for access; then you will return to Metropolitan; turn right/West; then next right on to Ft. Leavenworth with your authorization.

ST. JOSEPH, MISSOURI

Contact Connie Rehm: c3j10r@gmail.com

A feature for this area will be *free* Second Saturday educational presentations by the KC Chapter. Sessions will be held at **Rolling Hills Library**, 1904 N. Belt St., St. Joseph MO. Schedule and presentation topics can be found on p. 4.

COLUMBIA, MISSOURI

Contact Hanna Klachko: hklachko@centurylink.net

SPRINGFIELD, MISSOURI

BetterInvesting members in the Springfield area who are interested in becoming a part of ongoing activities may contact the following:

Kathy McGovern: kathymcgovern1@att.net

Billie Nelson: billienelson@yahoo.com

Gene Toner: gtoner60@gmail.com

Own Your Share of America

Introduction to stock investing including a review of terms and the BetterInvesting philosophy. The class will be presented twice.

April 2 and 4, 2019 5:30-6:30 PM

The Library Center - Springfield-Greene County
4653 S Campbell Avenue
Springfield, MO 65810

WICHITA, KANSAS

Contact John Kimmel: johnkimmel@cox.net

SEEKING BETTERINVESTING VOLUNTEERS

in areas of Kansas

Manhattan, Hutchinson, Salina, Dodge City, and other cities in KS

The KC Chapter of BetterInvesting includes all of Kansas and the western half of Missouri. We are seeking members who would like to serve as volunteers in their geographical areas to promote interest and investor education in a BetterInvesting community. This could include contacting new members, club visits, helping BI members access free Webinars on the BI website and utilize Online Tools and/or *Toolkit* software to complete the Stock Selection Guide (SSG). We currently have Satellite Chapters in Columbia MO, Wichita KS and Springfield MO. If you are willing to help with this or would like further information, please contact Al Mueller: alcmueller@earthlink.net

OPEN MODEL CLUB MEETINGS & STOCK TALK

Open Model Club Meetings of the Kansas City Chapter offer an opportunity to observe an experienced investment club in action. The meeting is open to persons already in clubs or those wanting to join a club or get a club started. The sessions are scheduled on Monday evenings from 6:15 p.m. to 8:00 p.m. Observers will have an opportunity to see the Model Club members review the portfolio of holdings and investigate new stocks through an Industry Study. Following the meeting, members will discuss stocks of interest to them in a roundtable format. Observers will have an opportunity to ask questions about investment club procedures, starting a club and/or maintaining the memberships and interest in their current club. All open meetings are *free and open to the public*. Register online prior to the meeting date at www.betterinvesting.org as shown on p. 9.

Feb. 25, 2019 Corinth Library

Apr. 22, 2019 Cedar Roe Library

July 22, 2019 Cedar Roe Library

Corinth Library is located at 8100 Mission Rd., Prairie Village KS 66208

Cedar Roe Library is located at 5120 Cedar St., Roeland Park KS 66205 (behind the Walmart in Roeland Park)

SATURDAY STOCK STUDY SERIES

A Free Series Offered by the Kansas City Chapter

A *free series open to the public* will be offered on First Saturday mornings of the month from 10:15 a.m. to 11:45 a.m. in the **Kansas City** Metro area. These sessions will be at Cedar Roe Library, 5120 Cedar St., Roeland Park KS 66206 (behind WalMart in Roeland Park).

This *free* series will also be offered on Second Saturday mornings in the **St. Joseph** area from 10:00 a.m. to 11:30 a.m. at Rolling Hills Library Community Room, 1904 N. Belt, St. Joseph MO.

Each session will open with a topic of interest to all investors, with the last 30 minutes open for discussion and questions concerning stock investing. Many of our members have asked for an opportunity to discuss specific companies. This is the opportunity to **Talk Stocks**. Bring companies you are interested in, and we can import the information into the *Toolkit 6* program and have a group discussion.

KANSAS CITY area schedule:

Kansas City Metro area **requires *free* advance registration** by Thursday preceding the session on the website: www.betterinvesting.org as shown on p. 9 of this newsletter.

Please check weather cancellation policy on p. 8 of this newsletter.

Feb. 2, 2019 Tax Reform: What You Need to Know—Find out what the 2017 Tax Cuts & Jobs Act will mean for you in preparing your tax return. The session will address changes for the individual.

Mar. 2, 2019 Advanced SSG Judgement—Review the SSG with emphasis on interpreting the data and the thought process for applying judgement

Apr. 6, 2019 Investment Clubs—Find out what investment clubs are and how to find or start one.

ST. JOSEPH area schedule:

In the St. Joseph area you have *free* registration at the library up to the morning of the presentation or contact Connie Rehm at c3j10r@lycos.com Events will be held on the second Saturday of each month.



Sunflower Partners
of Topeka KS were recognized
for their 20 years as a
BetterInvesting club.

INVESTMENT CLUB ANNIVERSARIES

As club anniversary dates occur (5 year intervals), the club will be contacted by a Director from KC BetterInvesting. In the Kansas City, Columbia, Wichita and Springfield metro areas, a Director will offer to attend a club meeting to present the anniversary certificate. We believe that this will give us an opportunity to become better acquainted with the BI members in our area. We look forward to visiting your club.



Morning Market Minders of Shawnee Mission KS celebrated 20 years as a BetterInvesting club.

Wise Assets Investment Club of Shawnee Mission KS has been a BetterInvesting club for 25 years.



INVESTMENT CLUB ANNIVERSARIES



LAPL Investment Club of Manhattan KS celebrated 25 years as a BetterInvesting club.



Mid Kansas Investment Club received a certificate for 35 years as a BetterInvesting club.

INVESTOR EDUCATION WORKSHOP SPRING 2018



The Spring Investor Education Workshop sponsored by KC BetterInvesting was held at KU Edwards Campus on April 21. Gary Ball, BI National Director, was the primary presenter. His topics included PE Ratios, When to Sell, Investing for Financial Independence and Divesting During Retirement.

ARE YOU INTERESTED IN BECOMING A MEMBER OF THE KC MODEL INVESTMENT CLUB?

The Kansas City Model Investment Club is expanding its education program to enable any BetterInvesting member to join. This is a great opportunity to learn more about investing while belonging to the club. Some of our members have been in the club for over 20 years and have a wealth of investing experience. The club follows BetterInvesting principles, and you may learn more advanced investing skills.

This is a two-year program with the option to extend. The club is accepting a maximum of two new members at this time. We ask that you attend a minimum of two club meetings before deciding to participate. Your joining is contingent upon simultaneous membership in the KC Chapter as an Associate Director.

The KC Model Investment Club meets on the fourth Monday evening of each month, and the KC Chapter meets on the third Monday evening of each month.

If you have an interest in or questions about becoming a member of the Kansas City Model Investment Club, contact Al Mueller by email at alcmueller@earthlink.net or by phone: 913-682-1440.

MEMBER RESPONSIBILITIES:

1. Maintain a current BI membership
2. Attend, participate regularly and make regular investments in the Model Investment Club
3. Own a stock analysis tool or have access to BI Online Tools
4. Maintain a regularly accessed email account
5. Participate in an industry study at least once a year
6. Comply with the Model Investment Club Bylaws



SCHEDULE OF UPCOMING CLASSES

Registration must be received 48 hours prior to the date of the class. There will be a **\$10 additional charge** for registering at the door. Please notify the KC BI Chapter Directors 45 days in advance of a class of any **special accommodations** you may require. Please state your specific needs. To qualify for the BI discount, include your BI member number which is after the hyphen on the mailing label of *BetterInvesting Magazine*. Registration can be completed online at www.betterinvesting.org as shown on p. 9.

Sessions in 2019:

<input type="checkbox"/> Feb. 9:	Basic Investing, Mazuma Credit Union, OP KS	_____ \$25 with ID#	_____ \$30 no ID#
<input type="checkbox"/> Feb. 23:	SSG I, Mazuma Credit Union, OP KS	_____ \$25 with ID#	_____ \$30 no ID#
<input type="checkbox"/> Mar. 9:	SSG II, Mazuma Credit Union, OP KS	_____ \$25 with ID#	_____ \$30 no ID#
<input type="checkbox"/> Apr. 27:	Investor Education Workshop, KU Edwards Campus, OP KS	_____ \$35 with ID#	_____ \$40 no ID#

Register now online. See p. 9 for instructions.

WEATHER CANCELLATION POLICY

In case of inclement weather when driving is dangerous, we will cancel classes and other activities. We can contact you the night before if we have the correct email address on your registration. When in doubt before driving to classes, contact one of the following by phone or email, using information shown on p. 9:
Al Mueller or Dennis Boatright

Visit-A-Club Program

Would you like to learn more about participating in an investment club? This program will offer an opportunity to visit established investment clubs in your local area and to observe their application of BetterInvesting principles. The local BI website has a page of FAQs about the program. The KC Chapter is seeking BI investment clubs that are willing to hold open meetings for visitors to see your club in action. Please consider completing an application to be a part of this program. The application is available on the KC BI website. Further details will be forthcoming in the near future.

KC BI SPECIAL SERVICES

Does your club need a tune-up or do you have questions about club procedures, bylaws or record keeping? Directors from the KC Chapter will visit your club at *no cost* to you to discuss such issues. Directors have a range of knowledge on investing subjects, such as PE ratios, portfolio balancing, creating a watch list, debt to equity, earnings growing faster than sales and utilizing resources on the BI website. These educational topics usually take about twenty minutes of a club meeting. Customized classes are also available for your club to teach the **Stock Selection Guide I and II**. The classes will use *Toolkit 6* and the Online Tools in teaching the front and back pages of the SSG. Handouts will be provided. The cost for each class is \$10 per person with a minimum of \$100. Contact a BI Director listed on p. 9 of this newsletter to schedule these services. Your club will need to secure the location and work out a mutually agreed upon time and date for the session(s).

KC BI[®] DIRECTORS and VOLUNTEERS

Dennis Boatright, President	816-478-0718	drboatright4@gmail.com
Al Mueller, Vice President	913-306-4723	alcmueller@earthlink.net
Bob Easton, Secretary	816-616-2549	bob@easton.net
Judy Weeks, Treasurer	816-741-0724	jaweeks99@yahoo.com
Janice Stonestreet, Chairman	913-451-0620	k5stoney7@aol.com
John Kimmel, Wichita	316-686-2731	johnkimmel@cox.net
Hanna Klachko, Columbia	573-443-7734	hklachko@centurylink.net
Kathy McGovern, Springfield	417-864-7446	kathymcgovern1@att.net
Billie Nelson, Springfield	417-761-3878	billienelson@yahoo.com
Connie Rehm, St. Joseph	816-324-4939	c3j10r@gmail.com
Gene Toner, Springfield	417-559-0322	gtoner60@gmail.com
David Wallisch	303-588-4834	WallischD@hawks.rockhurst.edu
Diane White, Publicity	816-896-8850	Ldyhalmark@gmail.com
Pat Elrod — Director Emeritus		

Home Office, Michigan:
www.betterinvesting.org
 1-877-275-6242 toll free

KC Chapter & BI Email Updates

The Chapter has an email distribution to remind both BI **members and non-members** of upcoming local and national events. This is a good way of alerting you to any changes in the planned schedule shown in this newsletter.

Let us know to include you in the monthly Chapter email. You can cancel at any time using this website:

www.betterinvesting.org

This takes you to the BI home page

1) Click on Chapters/My Chapter if you are a member and “Find a Chapter Near You” if you are not a member or not logged in.

The KC Area Chapter page contains links to **Local Events, Contacts, Visit-A-Club, Investment Club Support, News & Articles and Volunteering.**

2) To be included in KC Chapter emails, scroll down to **Learn More** and enter the requested information, then click “Subscribe”

3) You can unsubscribe at any time using this website.

Register Now Online

You can enroll in KC BI classes and programs online at:

www.betterinvesting.org

This takes you to the BI home page

- 1) Click on Chapters/My Chapter if you are a member or “Find a Chapter Near You” if you are not a member or not logged in.
Scroll down to Kansas or Missouri to select Kansas City Area
- 2) Click on “**Local Events**”
- 3) Click on the class you want to attend
- 4) Select “Click here to Register Online” which takes you to Eventbrite to register