



2019 ANNUAL MEETING OF THE ROCKY MOUNTAIN CHAPTER OF BETTER INVESTING



WELCOME

Thank you for joining us today!

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AGENDA

- Welcome and Purpose of the Chapter
 - 15 minute business meeting
 - 60 minute guest presentation
- Business Meeting
 - Chapter Finances – Income Statement
 - Election/Re-election of Directors
 - Current Directors: Joan Loken, Ross Meredith,
 - New Directors: Debie Monax, Dori O’Shea
 - Call for Volunteers
 - Plans and Objectives for 2020
 - Club visits
 - Classes (attached)
 - Webinars
 - Chapter Website
 - FaceBook
- Introduction of Guest Speaker: Saul Seinberg
- **Dividend Growth Investing**
- Wrap-up and End of Meeting

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CHAPTER FINANCES

- Treasurer: Sharon Mahler
- Income Statement

| NAIC CHAPTER 604 Profit & Loss October 2018 through August 2019 | |
|---|-----------------|
| | Oct 18 - Aug 19 |
| Income | |
| 33900 - INVESTOR FAIR | |
| 34803 - INVESTOR FAIR - REGISTRATION | 2,465.00 |
| 34904 - INVESTOR FAIR - OTHER | 20.00 |
| Total 33900 - INVESTOR FAIR | 2,485.00 |
| 34200 - EDUCATIONAL PROGRAMS INCOME | |
| 34202 - CLASS #102 INTRO TO INVESTING B | 136.80 |
| 34204 - CLASS #103 MUTUAL FUND ANALYSIS | 126.75 |
| 34205 - CLASS #201 BEGINNING S&P | 141.35 |
| Total 34200 - EDUCATIONAL PROGRAMS INCOME | 405.90 |
| 36000 - NAIC MATERIALS SOLD | 30.00 |
| 36001 - NAIC SUPPORT | 100.00 |
| Total Income | 3,020.90 |
| Gross Profit | 3,020.90 |
| Expenses | |
| 47900 - INVESTOR FAIR EXPENSES | |
| 48001 - INVESTOR FAIR - PRINTING | 10.50 |
| 48008 - INVESTOR FAIR - OTHER EXPENSE | 223.71 |
| Total 47900 - INVESTOR FAIR EXPENSES | 234.21 |
| 48200 - EDUCATIONAL PROGRAMS EXPENSE | |
| 48201 - AUTO | 9.52 |
| 48203 - PRINTING/PHOTOCOPIING | 22.05 |
| Total 48200 - EDUCATIONAL PROGRAMS EXPENSE | 31.57 |
| 53021 - BOARD ADMINISTRATION EXPENSE | 479.40 |
| 53031 - CHAPTER TRAINING | 33.05 |
| 53055 - MISCELLANEOUS EXPENSE | 163.85 |
| 70000 - CONGRESS EXPENSE | 2,200.00 |
| Total Expense | 3,142.08 |
| Net Income | -121.18 |

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BOARD OF DIRECTORS



- John Rogers, Chairman
- Ralph Futch, Vice President
- Betsy Wills, Vice President for Education
- Joan Loken, Regional Director
- Sharon Mahler, Treasurer
- Lois Krause, Director
- Ross Meredith, Director
- Jane Nelson, Director
- Shirley Pfister, Secretary
- Lamaint Wallin, Associate Director
- Debie Monax, Associate Director
- Dori O’Shea, Associate Director
- Julie Midyett, Volunteer

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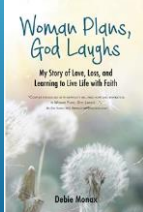
RE-ELECTION OF CURRENT DIRECTORS

- Joan Loken
- Ross Meredith

ELECTION OF NEW DIRECTORS

- Debie Monax
- Dori O'Shea

Let's Vote



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CALL FOR VOLUNTEERS

contact@rmchapter.org



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2020 PLANS AND OBJECTIVES

- Club Visits – Jane Nelson
 - Anniversary Celebration
 - Upon Request
- Classes
- Small Talk Webinars
 - Model Club
- Chapter Website
- Chapter FaceBook Page

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CHAPTER WEBSITE

www.rmchapter.org



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SMALL TALK EDUCATION SEGMENTS

2017

- Review of prior presentations (Recording) (Handout)
- Required Minimum Distributions (RMDs) (Recording) (Handout)
- Manage Your Risks (Recording) (Handout)
- Comparing ETFs & Mutual Funds (Recording) (Handout)
- Ins and Outs of IRAs (Recording) (Handout)
- Diversity in a portfolio (Recording) (Handout)
- Researching Small Companies (Recording) (Handout)

2018

- Selecting A Low Price Review (Recording) (Handout)
- Keep, Toss, Or Shred (Recording) (Handout)
- Fiduciary Rule (Revised) (Recording) (Handout)
- Stock Buybacks -Misconceptions and the Truth (Recording) (Handout)
- After Hours Trading (Recording) (Handout)
- Why Small Companies? (Recording) (Handout)
- Reversion To The Mean (Recording) (Handout)

2019

- Screening for Small Company ETFs (Recording) (Handout)
- Alphabet Soup...My financial advisor is a what?? (Recording) (Handout)
- Mid-Sized Companies Belong In Your Portfolio (Recording) (Handout)
- Using a 10k In completing an SSG (Recording) (Handout)

Educational Segment of Club Meeting

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CHAPTER FACEBOOK PAGE

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OUR GUEST SPEAKER SAUL SEINBERG

- Former Chapter VP for Education
- Teacher: Local, Regional, National
- How to Become Successful Dividend Growth Investors

| Category | Annual Return | Final Value |
|-------------------------------|---------------|-------------|
| Highest Yields | -2.8% | \$4,600 |
| Non-dividend Payers | 2.3% | \$36,400 |
| S&P 500 | 7.6% | \$210,700 |
| Dividend Payers | 9.3% | \$413,100 |
| Dividend Growers & Initiators | 10.7% | \$559,700 |

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WRAP UP AND END OF MEETING

- Elected directors
- Reviewed Plans for 2020
- Enjoyed Saul Seinberg's great presentation on dividend investing
- See you at a class or webinar
- Good Evening and **Good Investing**

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