

GRANITE STATE CHAPTER OF NAIC®

Members of the Board of Directors will visit investment clubs on request. We ask that your club complete this form and return it to the address at the bottom of the page. The information will help us understand your needs and be better able to serve you. We will respond to your request as soon as possible.

NAME OF CLUB _____ DATE FORMED _____

NUMBER OF CURRENT MEMBERS _____ NAIC CLUB # _____

NUMBER OF MEMBERS WHO RECEIVE *BETTER INVESTING* MAGAZINE _____

DATE, TIME & PLACE OF CLUB MEETINGS _____

Please indicate by checking if your club has completed the following:

- Federal and State Tax ID number obtained
- Partnership agreement completed and signed by all members
- By Laws completed
- Bank Account opened
- Broker selected and account opened

Does your club use the NAIC Stock Selection Guide? _____
Has your club begun to purchase stocks? If so, how many stocks are owned? _____
What NAIC workshops have members attended in the past two years? _____

Do you use Club Accounting software? _____ Club Members use: Toolkit or Stock Analyst Plus

PLEASE EXPLAIN WHY YOUR CLUB WISHES TO HAVE A DIRECTOR VISIT. ALSO, LIST ANY SPECIFIC QUESTIONS YOU WOULD LIKE ANSWERED. Use back of sheet if needed.

CLUB CONTACT PERSON: Name _____ Phone: _____

E-mail _____ Best Time to Call _____

Please mail completed form to: Granite State NAIC Chapter, PO Box 43, Concord, NH 03302-0043

GRANITE STATE CHAPTER OF NAIC®

CLUB VISIT REPORT

Name of Club _____

NAIC # _____

Person Contacted _____

Address _____

Telephone (home) _____ (work) _____

Makeup of membership: Males _____ Females _____

Does club appear to have good leadership? _____

Does club use NAIC stock study tools? _____

Do members seem to have long-term investment goals? _____

Are members familiar with NAIC literature? _____

Areas where Chapter may be of assistance to Club _____

Areas where NAIC Headquarters may be of assistance to Club _____

Comments: _____

Visit made by: _____ Date _____

HOW TO PREPARE FOR CLUB VISITS

- **Tell of Success In Your Club and Other NAIC Clubs**
- **Purpose of Club Visits by Chapter Directors**
 - ✓ Give direction in formation and operation
 - ✓ Help overcome problems
 - ✓ Give encouragement
 - ✓ Show NAIC membership benefits
 - ✓ Explain NAIC Philosophy
- **New Clubs**
 - ✓ Organization
 1. Become NAIC members
 2. Review benefits, helps and philosophy
 3. Review 13 suggested steps for starting a club (see Membership Catalog)
 4. Club is an education tool
 5. Learning with a small amount of money at risk
 6. Call or write IRS for tax number—for SS4 Application for Tax ID#--800-829-1040
 7. Size of membership
 8. Elect officers
 9. Decide on name
 10. Sign Partnership agreement—legal in all 50 states and Register name with Secretary of the State of NH.
 11. Draw up By Laws
 12. Open bank account—bank or credit union
 13. Decide on broker—discount, full
 14. Explain tax consequences
 - ✓ Operating as a club
 1. Treat club as a business
 2. Importance of an agenda
 3. Stock studies
 4. Selecting stocks to study and tools to use
 5. Follow each stock bought
 6. Computer helps
 7. Not instant success
 8. Accounting
 9. Registering stock bought
- **Existing Clubs**
 - ✓ All items above pertaining to existing as well as new clubs
 - ✓ Additional items to mention
 1. Ask ahead of time what might help them most

2. Study their portfolio ahead of time (do not discuss at meeting)

➤ **Materials to Leave**

- ✓ Application for NAIC club membership
- ✓ IRS application blank
- ✓ *Better Investing*
- ✓ Membership Guide and any NAIC flyers
- ✓ Chapter Newsletter
- ✓ *BITS*
- ✓ NAIC Fact Sheet
- ✓ Chapter Fact Sheet
- ✓ Magazine & Newspaper clippings
- ✓ An example of By Laws
- ✓ Local Computer Group
- ✓ Investors Advisory Service
- ✓ National NAIC
- ✓ NAIC tools

➤ **Suggest Materials for Reference**

- ✓ Mr. Tom O'Hara's and Helen McLane's book, *Taking Control of Your Financial Future*
- ✓ Peter Lynch's books
- ✓ Clippings from *Better Investing*
- ✓ The Beardstown Ladies books
- ✓ Articles from newspapers and magazines referring to NAIC
- ✓ Glossary of stock terms
- ✓ NAIC computer software
- ✓ *Better Investing's* Top 100
- ✓ Stocks in the Dow Jones Index
- ✓ National newspapers and magazines
- ✓ List of TV business programs with channels and times

➤ **Miscellaneous**

- ✓ Save time for questions and answers
- ✓ If you do not have an answer, find and report back
- ✓ Sign-up sheet for those not on your mailing list
- ✓ NAIC materials for sale can be purchased at all Chapter programs
- ✓ All stock names mentioned are for demonstration **NEVER** for recommendation
- ✓ NAIC, a nonprofit organization
- ✓ Directors are volunteers

FOCUS ON THE LONG-TERM; HAVE A PLAN AND STICK TO IT!