

SOUTH WEST NEWS



Editor: Jackie Forslund (941) 743-3789 forslund@sunline.net

SWFC web site: <http://www.better-investing.org/chapter/swflorid/>

JANUARY, 2004

REGISTRATION FOR THE FOLLOWING EVENTS:
MAKE CHECKS PAYABLE TO SWFC-NAIC

MAIL TO: Phyllis Brocklehurst

5207 Skylark Court

Cape Coral, FL 33904

CHECKS MUST BE POSTMARKED BY RSVP DATE!

Please use the Web site to download the **Registration Form** when mailing checks. See **Registration Form information** on page 2.

Questions??? Phylleebrock@aol.com

(239) 945-4501

REMINDER!

Melba J. Congleton Memorial Service Award

January 15, 2004, is the due date for nominations for the award. Melba was a charter member of the SWFC-NAIC and gave much of her time and effort to helping and teaching others about long term investing using NAIC investment principles, tools and techniques.

Remember to include a factual statement with anecdotes describing why the nominee should receive the award as well as identifying information including his or her NAIC membership number. Anyone who is a member of SWFC-NAIC, whether an individual or club member, is eligible. See the September, 2003, newsletter *South West News* and the web site: <http://www.better-investing.org/chapter/swflorid/> for more details. The winner will be announced at the SWFC Annual Luncheon Meeting, April 3, 2004.

Send nominations to: Janet Rannenberg, 166 Crescent Drive, Punta Gorda, Florida, 33950 or e-mail her at:

jrannenberg@earthlink.net

PERT!

1ST PRESENTATION IN 2004

"Beginning PERT"

(Portfolio Evaluation Review Technique)

Saturday, January 17, 2004

9:30 to 12 Noon

Josephine Calabro, the Vice President of SWFC-NAIC, will make the presentation. Have you heard about **PERT** but don't know what it does or how to do it? Or have you tried and just don't understand it? Then this workshop is for **you**. Jo will begin with basics of **PERT** and walk you through the entire program.

(See page 2 for details)

Just a word about the *October 18th, Presidents Coffee.....*

Our president, Janet Rannenberg was really impressed (as were we all) with the information and the unique and exciting ideas that were presented by the many who attended. Betty Honeycomb, brought handouts and spoke just long enough to garner everyone's interest, and then we were off! The feed-back was positive, effusive and stimulating. So just wait until next year! The board has already placed it on our 2004 calendar of events.

S einberg in February

Saul Seiberger, Director, NAIC Computer Group, comes to us from Colorado, where he is a corporate attorney.

Saul will be presenting both Friday night and all-day Saturday, covering four topics that you have requested: cash flow, preferred procedure, portfolio management, and growth sectors.

You should not miss this rare opportunity to hear Saul, an outstanding speaker with an understated sense of humor and a great depth of knowledge.

For a complete description of his topics (too long to write of here), please go to:

www.better-investing.org/chapters/swflorid/events

(See page 2 for details)

JOIN US FOR AN INTERESTING MORNING AT OUR ANNUAL LUNCHEON

Saturday, April 3, 2004

Holiday Inn La Marina, Ft. Myers

We are pleased to have **Dawn Litchfield Brown** as the speaker. She started in the investment field in 1982 and formed Litchfield, Nelson & Company in Naples in 1987, providing clients with financial advice, estate planning, asset management, brokerage and insurance services.

Dawn is well known locally because of her involvement in the media, hosting radio and TV shows. She has spoken at national conventions, service and church groups as well as colleges and charitable organizations. She is also distinguished for her community involvement. Her topic will be "**Frozen Feet and Goals to Meet**", a look at the perils of the market and how to set a practical approach to your goals. She's a dynamo and we **know** you will enjoy her!

(Article continues on page 2 together with location details)

EMAIL WORKSHOP

By popular demand, we will be offering an **Email Workshop** on **February 28**, at the South (Lee) County Regional Library.

Janet Rannenberg will be showing you, in detail, how to make attachments, and how to send and receive attachments on your email. These will include Word documents (secretary's minutes), treasurer's reports, and SSGs from all the softwares. A slide presentation will be followed by real-time illustration, plus there will be a detailed hand-out for you to follow at home.

Want to improve your club's efficiency? Or just send better emails? **Then this workshop is for you!**

Cost is \$10. **RSVP by February 21**. Doors open at 9am; sign-in begins at 9:15am, program starts at 9:30am.

(See page 2 for details)

Wait! There's More!



At the present time, South West News is being sent to only one member of each club. Until we can expand our mailing list we ask that these "club contacts" share the Newsletter with other members in their club. **Thank you for your help.**

Please Note: SPECIAL PRESENTATION! You asked for it and now we can provide it!

MARCH 13, 2004 – “SSG Judgment for Beginner/Intermediate”

(See details below)

(Annual Luncheon continued from page one)

Prior to the speaker's message, the annual meeting will be conducted by our, President, Janet Rannenberg. Minutes from last year will be handed out to the members before the meeting. Concise reports from the various directors will be given. There will be announcements of many of the 2004-2005 events to come. Nominations for directors of the SWFC will be read and voted upon. The winner of the “Melba J. Congleton Memorial Service Award” will be announced and introduced. After our guest speaker, lunch will follow. Door prizes will be given out. (See details below)

HELPFUL HINTS FROM YOUR EDITOR

ITEM: How to get there from here! Have you seen our EASY TO USE new Better-Investing, South West Florida Web Site? Do you know how to **print** an event **Registration Form** which you should send along with your check to **Phyllis Brocklehurst** for your reservations?

Well, **follow me:** Go to **www.better-investing.org** and then click on **Chapters** (in left margin), scroll down to **Florida**, scroll down to **South West Florida**, click, go to the small yellow colored box on the right, click **Calendar of Events**. See **“Registration Form”** and click to open. Click **File** at the top left of your screen and then click **Print**. **Voila!**

ITEM: NAIC has just completed and significantly rewritten the **Stock Selection Handbook**. It is superior. You'll find it clear and concise in understanding the SSG. Our own Chapter President, **Janet Rannenberg**, assisted in its editing presentation. Also, just recently completed is the **NAIC Investing for Life-Youth Handbook**, which is excellent for the beginner. Both books sell for \$15 with no freight expense. They will be available at each of our SWFC events and could certainly be used as a gift.

2004 CALENDAR OF EVENTS

For details a map and driving instructions, see our Web site: www.better-investing.org/regions/swflorid/html

- 1/17/2004:** “**Beginning PERT**” presented by, **Josephine Calabro**, 9:30 – 12:00 noon (Sign-in starts at 9:15am), doors open at 9:00am. At the South (Lee) County Regional Library, 21100 Three Oaks Pkwy, Estero. **Directions:** I-75, exit #123, west on Corkscrew Road to the first traffic light, right onto Three Oaks Pkwy. The Library is about 0.1 miles on the left. **Cost:** \$10. **RSVP by January 10th**. Don't forget to bring pen and paper.
- 2/13/2004** “**The Zen of Cash Flow**” & “**The Preferred Procedure**”, **Saul Seiberg**, Director, NAIC Computer Group, will present his program at the Royal Palm Yacht Club (sponsored by Royal Palm Yacht Club member Carolyn Veglia), 2360 W. First Street, Ft. Myers 6:30pm – 8:45pm. (Sign-in starts at 6:15pm) **Directions:** First Street runs along the south side of the Caloosahatchee River. Royal Palm Yacht Club is west of La Marina, where First Street takes a right angle to the left, then comes out by the Edison Home. **Cost:** \$15.00. **RSVP by February 6th**. Bring pencil & paper to take notes.
- 2/14/2004** “**Portfolio Management: the Good, the Bad, & the Rest of Us**” (morning topic) & “**Finding Growth Sectors on \$1 a Day!**” (afternoon topic). **Saul Seiberg**, 9:00 – 3:30pm (Sign-in starts at 8:30am). Royal Palm Yacht Club (sponsored by the Royal Palm Yacht Club member Carolyn Veglia), 2360 W. First Street, Ft. Myers **Directions:** First Street runs along the south side of the Caloosahatchee River. Royal Palm Yacht Club is west of La Marina, where First Street takes a right angle to the left, then comes out by the Edison Home. **Cost** \$40, lunch is included. **RSVP by February 7th**. Bring pencil & paper to take notes.
- 2/21/2004:** **Email Workshop** presented by, **Janet Rannenberg, President, South West Florida Chapter**. 9:30 – 12:00 noon (Sign-in starts at 9:15am), doors open at 9:00am, at the South (Lee) County Regional Library, 21100 Three Oaks Pkwy, Estero. **Directions:** I-75, exit #123, west on Corkscrew Road to the first traffic light, right onto Three Oaks Pkwy. The Library is about 0.1 miles on the left. **Cost:** \$10. **RSVP by February 21st**. Don't forget to bring pen and paper.
- 3/13/2004:** “**SSG Judgment for Beginner/Intermediate**”, presented by **Janet Rannenberg, President of the South West Florida Chapter**, 9:30-12 noon. (Sign-in starts at 9:15, doors open at 9am), South (Lee) County Regional Library, 21100 Three Oaks Parkway, Estero, Florida. **Directions:** I-75 exit #123, west on Corkscrew Road to the first stoplight, right onto Three Oaks Parkway. The Library is about 0.1 miles on the left. **Cost:** \$10 **RSVP by March 6th**. Don't forget to bring pen and paper.
- 4/03/2004** **Annual Luncheon Meeting** with **Dawn Litchfield Brown**, who will give her presentation on “**Frozen Feet and Goals to Meet**”. 9:00am – 1:30pm (Sign-in starts at 8:30am) at the Holiday Inn La Marina, 2220 W. First Street, Ft. Myers. **Directions:** First Street runs along the south side of the Caloosahatchee River. The La Marina is about four blocks west of the old RT.41 bridge, downtown. **Cost:** \$40, lunch is included. **RSVP by March 27th**.

❖ **To Contact any of our directors, please use our Web site for addresses. We want to help!**



Investment Education Since 1951
www.better-investing.org

South West Florida Chapter Events

Jackie Forslund, Editor
South West Florida Chapter – NAIC
26232 Copiapo Circle
Punta Gorda, FL. 33983

Mail To: