

# Chapter Meeting Schedule

## MEETING TOPICS

All programs subject to change.

Please subscribe to the New York Chapter E-mail Announcement List for the most up-to-date information.

### New York City Division Meetings

Third Tuesday of every month - 6:15pm

Location: Washington Irving High School

40 Irving Place – between 16<sup>th</sup> & 17<sup>th</sup> Streets

#### 2006

January 17,	Low Cost Investment Plan and Divident Reinvestment Plans (DRIPs)
February 21	Asset Allocation – Tools for a Successful Portfolio
March 21	Profiting from Investment Newsletters
April 18	The Computer Group is Coming to You – Studying Stocks the Computer Group Way
May 16	<u>Annual Meeting</u> : Guest Speaker to be announced. Chapter Elections
June 20	Making the Most of Value Line – Investing in Timely Industries – Digging for Gold In Annual Reports
July 18, 2006	Stock Selection Guide: Noticing and Improving your errors in judgment
August 15, 2006	Roundtables with Chapter Directors
September 19, 2006	
October 17, 2006	One Page Quick Analysis
November 21, 2006	When to Sell the Turkeys (So that you don't become one)
December 19, 2006	How to Profit in 2007

### Computer Users Group (NYPC/NAIC Investing SIG)

Second Friday of every month - (except August) - 6:15pm

Location: Microsoft's Offices

1290 Avenue of the Americas, 6th floor

(Sign in for NYPC Meeting, please bring identification)

Go to NYPC.com for updates on meeting and topics

At every meeting we evaluate stocks using NAIC stock evaluation tools.

#### 2006

January 13, 2006	Telecom Equipment – Avaya, Qualcomm, ADC Telecom, others
February 10, 2006	Stock Prospector Software for Screening
March 10, 2006	Canadian Energy
April 14, 2006	Computer Peripherals and Software
May 12, 2006	Advisory Service recommendations
May 16 2006	NY Chapter Annual Meeting (See New York City Division Meetings for details) <i>Please join us!</i>
June 9, 2006	Metals and Mining
July 14, 2006	Hotel/Gaming Industry – Report on CompuFest with gifts
August 2006	<b>No Meeting</b>
September 8 2006	Diversified Company Industry
October 13 2006	Healthcare, Medical Supplies, and Pharmacy Services
November 10, 2006	Railroad and Trucking Industry
December 8, 2006	Semiconductor and Semiconductor Equipment

The meetings will help you develop an investment strategy based upon the principles and philosophies of NAIC. Using Value Line and Online Premium Service data and NAIC software, we will evaluate stocks using NAIC methodology.

We also demonstrate stock screening and portfolio management software, as well as club accounting software, and access the internet to aid in company research and stock evaluation

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## *Our Mission*

The mission of NAIC is to create a nation of successful investors. Our purpose is two-fold:

1. Introduce individuals to the reasons for, and reward of, equity ownership.
2. Provide a program of investment information and education to enable individuals to become successful strategic and lifetime investors.



# BetterInvesting NY Chapter Education Fair

**Sat. January 14, 2006 – St. Francis College**  
**180 Remsen Street, Brooklyn, NY**  
**8:30a.m. to 4:30p.m.**

## EDUCATION FAIR SCHEDULE

8:30am – 9:15am	Registration
9:30 – 11:00am	Classes (Session 1)
11:15am – 12:45pm	Classes (Session 2)
12:50pm – 1:50pm	Lunch – on your own
2:00pm – 3:30pm	Classes (Session 3)
3:45 – 4:30	Club Clinic – Open discussion of club issues that may be affecting your club.

### LOCATION: St. Francis College - (718) 855-7925

#### By Subway:

Number 2 or 3 (7<sup>th</sup> Avenue express) to Borough Hall  
Number 4 or 5 (Lexington Avenue express) to Borough Hall  
A (8<sup>th</sup> Avenue express to Jay Street/Borough Hall  
B (6<sup>th</sup> Avenue express) to DeKalb Avenue; change to M or R to Court Street

C (8<sup>th</sup> Avenue local) to Jay Street/Borough Hall  
Also D, F, M, N, Q, R, W

**By Bus:** B25, B26, B38, B41, B51 or B52 to Court Street  
B37, B45, or B75 to Livingston Street  
B54, B57, B61 or B67 to Jay Street  
B 103 to Adams Street

By Staten Island Ferry

Take ferry to Manhattan; change to the R to Court Street  
By LIRR – Take LIFF to Flatbush Avenue terminal; change to 2, 3, 4 or 5 in the same station to Borough Hall

**By Car – contact St. Francis for directions**

## Class Descriptions

### Session 1 Choices

**A1- Beginner:** Is this stock worth further study? Understanding a company's growth, how to measure and evaluate it, and where growth comes from. The 10- Minute Stock Analysis and the Stock Check List will show you how determine if a company warrants further study

**B-1 Advanced Stock Selection Guide Techniques:** Learn how to use the Stock Selection Guide to enable you to make better investment decisions. Don't overpay for a company. The real benefit of investing the BetterInvesting way is to find a way not to lose money.

**C-1 Computer Program - Screening for Stocks (Prospector):** Introduction to the fundamentals of stock screening. We'll find out how to uncover great stocks using the Stock Prospector with BetterInvesting S & P Stock Data

### Session 2 Choices:

**A-2 Beginner;** How do we find stocks to look at? What do you need to know about a company in order to evaluate it as a prospective profitable investment. Resources include Value Line, magazines & newspapers

**B-2 Intermediate:** Introduction to the Stock Selection Guide –Overview of BI most valuable tool that allow you to record a company's past history and review management's effectiveness in order to project future performance and suggest the right price to pay for the stock.

**C-2 Stock Selection Guide Bloopers: Improving Judgment -** This class will look at common judgment errors on the Stock Selection Guide with an eye toward improving the logic of your stock study judgment.

### Session 3 Choices:

**A-3 Introduction to Financial Statements** This class will introduce students to annual reports, balance sheet and other statements

**B-3 Retirement planning using Mutual Funds:** This class is ideal for those who wish to improve their 401K using BI mutual fund study tools

**C-3 Computer Portfolio Record Keeper –** How to keep track of your stock and mutual fund transactions (purchases, sales, dividends, stock splits and dividend reinvestments

## Registration Fees

**\$30** BetterInvesting member pre-registered

**\$35** BetterInvesting member walk-in

**\$45** non-BetterInvesting member pre-registered

**\$50** non-Better Investing member - walk-in

**\$20** per BetterInvesting member - when three or more register together before 12/31/05.

**\$25** per person when 3 or more non-members register together by 12/31/05.

**\$50** per club when 3 more members of the same BetterInvesting club register together by 12/31/05

# Spring 2006 - Investor Education Seminars

You may be surprised to learn that the most common mistake investors make is not picking poor companies, but overpaying for good companies. At the Better Investing courses, you will learn how to tell if a stock is a good buy at today's price, or if you need to watch - and wait - until it comes down to your predetermined price. The New York Chapter of the National Association of Investors Corp. (NAIC) sponsors introductory to advanced level courses in investment education using NAIC Tools and Techniques for Stock Selection and Evaluation. You may register for one or more of the seminars described below. With the knowledge you gain from these seminars, you will be able to make your own investment decisions, construct and monitor a portfolio according to Better Investing principles.

## Seminar Descriptions

**Note: Not all courses are offered at each location each semester. Please check each class for the location(s) it is being offered this semester.**

**Location codes are at the bottom of the next column.**

**The dates following the location code are the dates for all the sessions in that course location.**

**Introductory Investing Seminar:** Opens the door to making your own investment decisions. This course will teach you the basics of understanding a company. It includes discussions of how a company forms and how the stock market works. It also includes discussions of investment terms, sources of financial data, and how to use Value Line data (a key tool for researching a company) **(6 hours – 3 Sessions) - Tuition:** Members \$35 Non-Members: \$45 **Locations:** NYC (Jan. 30, Feb. 6, 13, 2006)

**Basic Investing Seminar:** Will teach you to prepare the NAIC Stock Check List to assist you in doing basic stock analysis. The class will focus on understanding a company's growth, how to measure and evaluate it, and where growth comes from. We will also provide an overview of the Stock Selection Guide (SSG), which is the most important NAIC tool for helping investors make a decision about buying the right company at the right price. **(6 hours – 3 Sessions) Prereq: Introductory - Tuition:** Members \$35 Non-Members: \$45 **Locations:** NYC (Feb. 27, Mar. 6, 13, 2006)

**Intermediate Investing Seminar:** This comprehensive course teaches investors how to complete the Stock Selection Guide (SSG). You will learn to record a company's past history and how to review management's effectiveness under varying economic conditions. This course shows investors how to understand what a company's past performance tells us as a predictor of future performance. This class will also teach you how to complete the Stock Comparison Guide, which compares competitors and allows you to select the best company. **(12 hours – 6 Sessions) Prereq: Basic - Tuition:** Members: \$70 Non-Members: \$90 **Locations:** NYC (Mar. 20, 27, Apr. 3, 10, 24, May 1, 2006)

**Advanced Investing Seminar:** Many people overlook the vital importance of managing a portfolio. The decision to buy is not the end of the NAIC investment process. It should be followed by portfolio management. The portfolio management process includes the Portfolio Management Guide (PMG), Portfolio Evaluation Review Technique (PERT) and the Challenge Tree. The Portfolio Management Guide helps check the progress your stocks are making

relative to the valuations on your Stock Selection Guide. PERT enables you to monitor the performance of the fundamentals of your company. The Challenge Tree allows you to compare the merit of replacing a stock you now hold with another stock you wish to purchase. You should be thoroughly familiar with the SSG evaluation process before you take this course. **(6 hours – 3 Sessions) Prereq: Intermediate Tuition:** Members \$35 Non-Members: \$45 **Locations:** NYC (Jan. 30, Feb. 6, 13, 2006)

**Mutual Funds – The NAIC Way:** We want to make you a successful mutual fund investor. This class will help you sort through the mysteries and make decisions about the role of mutual funds in long-term investing. By using the tools provided in this course, which include the NAIC Mutual Fund Checklist, Comparison Guide and Trend Report, your prospects of buying the right fund for your portfolio will be greatly enhanced. **(6 hours – 3 Sessions) - Tuition:** Members: \$45 Non-Members: \$60 **Locations:** NYC (Feb. 27, Mar. 6, 13, 2006)

**Understanding and Using Annual Reports:** This class will introduce students to annual reports. It will discuss annual reports and what is in them, and then spend some time looking at how to work with the information to create meaningful financial ratios. **(4 hours – 2 Sessions) – Tuition:** Members: \$25 Non-Members: \$35 **Locations:** NYC (Apr. 3, 10, 2006)

**Club Clinic: How to Have a Successful Investment Club:** The Club Dynamics class is part seminar and part open discussion. The seminar will explore topics that will assist clubs in getting started, finding members and developing effective club documents. We will also explore running a successful club meeting and maintaining the effectiveness of the club. The class will allow time for an open discussion of club issues that may be affecting your club. This is your opportunity to work with the instructor on solving your club issues. **(2 hours – 2 Separate Sessions) – Tuition:** Members: \$25 Non-Members: \$35 **Locations:** NYC (Apr. 24, May 1, 2006)

**Club Accounting:** You asked for it, and it's finally here! In this two-part course we will cover all concerns for the person who needs it: the Treasurer! We will also cover the new Club Accounting 3 software in addition to iClub's Online Accounting Software. **(4 hours – 2 Sessions) Members:** \$25 Non-Members: \$35 **Location:** NYC (March 20, 27 2006)

## SEMINAR LOCATIONS



NYC – New York City

Washington Irving High School  
40 Irving Place (between 16<sup>th</sup> & 17<sup>th</sup> Street) NYC 10003  
All sessions at this location are from 6:30pm to 8:30pm

**COURSE REGISTRATION FORM  
CAN BE FOUND ON PAGE 4**

# Education Fair Registration Coupon

*BetterInvesting membership is not required*

PLEASE REGISTER BY COMPLETING THE ENCLOSED REGISTRATION COUPON AND MAILING IT WITH YOUR CHECK OR MONEY ORDER TO:



New York Chapter NAIC  
c/o Lillian Heard  
137-22 Southgate Street  
Springfield Gardens, NY 11413

Telephone: (718) 723-4360

YOUR CANCELLED CHECK IS YOUR RECEIPT

Instructions:

1. Enter the seminar location you wish to attend. Please use a separate form for different locations.
2. Check the Sessions you wish to attend.
3. Complete the remainder of this registration form. This form can only be used with payment by check or money order payable to: **BetterInvesting**. For credit card registration, please visit us online at:

<http://www.better-investing.org/chapter/article/newyork/699>

Enclosed is \$ \_\_\_\_\_ representing registration for \_\_\_\_ person(s).

**January 14, 2006 St. Francis College 180 Remsen Street, Brooklyn, NY**

**Please indicate your seminar choice(s):**

Select one class from each session (Please check one class in each column)

SESSION 1

SESSION 2

SESSION 3

A1- BEGINNER -Ten Minute Stock Analysis and The Stock Check List

A-2 DATA RESOURCES: How to find stocks to study

A-3 – Introduction to Financial Statements

B-1 Advanced Stock Selection Techniques

B2- Introduction to the Stock Selection Guide

B-3 Retirement planning with Mutual Funds

C-1 Computer – Stock Screening

C-2 Improving SSG Judgment

C-3 Computer – Portfolio Record Keeper

NAME: \_\_\_\_\_  
(please print)

CLUB NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

TELEPHONE: DAY: \_\_\_\_\_ EVENING: \_\_\_\_\_

NAIC Member # \_\_\_\_\_  Non-Member

## GENERAL CLASS REGISTRATION FORM

Instructions:



1. Enter the seminar location you wish to attend. Please use a separate form for classes at different locations.
2. Refer to the seminar information for dates and locations offered.
3. Complete the remainder of this registration form. This form can only be used with payment by check or money order payable to: **NAIC**. For credit card registration, please visit us online at:  
<http://www.better-investing.org/chapter/article/newyork/699>
4. Mail this form with payment to:

Joan Ford  
3400A Paul Ave.#19C  
Bronx, NY 10468

Telephone: 718-584-1130



Please remember to include the \$10 registration fee for each class at the Palisades Center Mall location.

*Advanced registration is required. Register early since seats are limited. No registration will be accepted at the door. Confirmation cards will be mailed. Please bring the confirmation card with you and present it to the instructor at the first session. If you want to be in the same class as a friend, please submit the registrations and payment in the same envelope. Please arrive 15 minutes early to allow time for check in at the registration desk.*

### SEMINAR LOCATION

New York City at Washington Irving High School – 17<sup>th</sup> Street and Irving Place, New York, NY

By Train: 4, 5, 6, N, R, Q to 14<sup>th</sup> Street

<b>SEMINAR REQUESTED:</b>	NAIC Member Price	Non-Member Price
<input type="checkbox"/> Introductory Investing Seminar	\$35	\$45
<input type="checkbox"/> Basic Investing Seminar	\$35	\$45
<input type="checkbox"/> Intermediate Investing Seminar	\$70	\$90
<input type="checkbox"/> Advanced Investing Seminar	\$35	\$45
<input type="checkbox"/> Mutual Funds – The NAIC Way	\$35	\$45
<input type="checkbox"/> Club Accounting	\$25	\$35
<input type="checkbox"/> Annual Reports	\$25	\$35
<input type="checkbox"/> Club Clinic	\$25	\$35

NAME: \_\_\_\_\_  
(please print)

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

TELEPHONE: DAY: \_\_\_\_\_ EVENING: \_\_\_\_\_

**NAIC Member #**

**Non-Member**