



CAPITOL INVESTOR NEWS

Spring 2003

From Your President

Given the current economic climate, many companies are focusing their energies internally. Therefore, it is with regret I announce that the DC Regional Chapter has decided not to hold the annual Investors Fair this March. The chapter has already signed a contract for April 24, 2004. To commemorate this 25th conference, the chapter will use the extra time to prepare an exceptional event for its members.

This April, three classes will be held at Phoenix University, Rockville, MD. The chapter is pleased to have found what looks to be another excellent location for classes. The majority of our regular classes for January, February, March and May are being held at George Mason University, Arlington, VA, in Room 115. This ground floor classroom is easily assessable to all.

While the current economic climate is not encouraging, we believe the investment principles you learn through our classes and from other NAIC publications still apply and should be used now to find good companies to invest in for the long term. Now more than ever you should be using and following the NAIC investment principles.

- Invest regularly, regardless of the market outlook;
- Reinvest all dividends and earnings;
- Invest in growth companies and
- Diversify to reduce risk.

Benay Glymph, President \$

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Annual Meeting – May 17th 9:30am—11:30am

The DC Regional Chapter celebrates its **40th anniversary** this year. Come join us in a special celebration at our annual meeting. All are welcome.

Do you have *Enough Money*? RICHARD VODRA, CFP, author of *Enough Money*. Investing is what you get to do as a reward for following good financial practices. Simple rules on how to handle cash flow, career development, saving for retirement, charitable giving, getting advice, and other issues, including such concepts as the 700% Solution®, the Lifetime Balance Sheet®, the Career Development Fund, and creating an Investment Policy Statement.

Global Investing; JOAN M. VEON, CFP. Since attending a United Nations conference in 1994, Joan has covered over 54 global conferences around the world, concentrating on the global economic structure of the world and how it relates to our economy, the dollar and investing client monies. Joan is in the process of writing her third book, *The Myth of Investing in the 21st Century*.

Guest Speakers	Door Prizes	Refreshments
Make a Club Connection		Chapter Elections
GMU , Arlington, Room 115		No Charge \$

Club Accounting – February 22

Special One Day Workshop

HERB BARNETT, well-known club accounting guru, a frequent contributor to the NAIC Club-treasurers email list, can answer all your questions. He will present a thorough grounding in club accounting principles: basic transactions, monthly reports, withdrawals, suspense transactions, year-end distribution and taxes, use of stand-alone and online software. Bring club accounting manual, questions, and problems for review. GMU, Arlington, Room 115 (1 day class. Cost \$50). \$

Spring 2003 Education Program Schedule

(100) Basic Investment Concepts

Jan. 18, 1:30pm—4:30pm **Instructors:** Hill/Williams
The nature of investing; risk & reward; NAIC investing concepts; SSG terms defined to ease preparation of SSG later. Discuss basic investment terminology; learn how to recognize quality companies to consider for your stock portfolio.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

Club President's Workshop

Jan. 25, 9:30am—12:30pm **Instructor:** King
Join other area club presidents' to share ideas and discuss club issues.

GMU, Arlington, Room 115 (1/2 day class. Cost \$10).

(201) Using Toolkit 4.0-Basic

Jan. 25, 1:30—4:30pm **Instructors:** Murphy/Lucas
 Background: 100, 200
Learn how to do the SSG stock analysis with Toolkit 4.0 software.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(200) Manual SSG—2 Saturdays

Feb. 1 & 8; 9:30 am—4:30 pm **Instrs.:** Harris/Tanoe/Christian
 Background: 100
For beginning investors. Covers NAIC's fundamental analysis tool, SSG, and how to prepare and use it as an investment tool.

GMU, Arlington, Room 115 (2 day class. Cost \$80).

(107) Value Line and NAIC Applications

Feb. 15, 1:30pm—4:30pm **Instructor:** Murphy
Use the Value Line report to find data for the SSG and to form NAIC type judgment about the quality and value of a prospective investment.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(103) Club Accounting

Feb. 22, 9:30am—4:30pm **Instructor:** Herb Barnett
Club accounting guru returns to present a thorough grounding in the principles of club accounting; basic transactions; monthly reports; withdrawals; year-end distribution and taxes; use of the stand-alone and online club accounting software. Bring club accounting manual, questions, and your club statements for review.

GMU, Arlington, Room 115 (1 day class. Cost \$50).

(300) Improving Judgment on the SSG

Mar. 1, 9:30 -- 12:30 pm **Instructor:** Goodhart
 Background: 200,201
Improve your judgment skills on the five key SSG decision points.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(400) Improving Club Portfolios Using PERT

Mar. 1, 1:30pm—4:30pm **Instructor:** Lucas
 Background: 200,201,202
How to monitor the progress of a portfolio using Toolkit Pro 4 by using Pert Worksheets, Management Guide, Trend Reports, and Pert Report.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(100) Basic Investment Concepts

Mar. 8, 9:30am—12:30pm **Instructors:** Tanoe/Christian
The nature of investing; risk & reward; NAIC investing concepts; SSG terms defined to ease preparation of SSG later. Discuss basic investment terminology; learn how to recognize quality companies to consider for your stock portfolio.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(101) NAIC Classic Software

Mar. 8, 1:30pm—4:30pm **Instructors:** Gillogly/Reddie
 Software helps the beginner complete an SSG by using cautionary prompts.

GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

(200) Manual SSG—2 Saturdays

Apr. 5 & 12; 9:30 am—4:30 pm **Instructor:** Frederick
 Background: 100
For beginning investors. Covers NAIC's fundamental analysis tool, SSG, and how to prepare and use it as an investment tool.

University of Phoenix, Rockville (2 day class. Cost \$80).

(102) Annual Reports & Cash Flow

Apr. 26, 1:30pm—4:30pm, **Instructor:** Lucas
Determine important data in a report and what to believe. Use of NAIC's Nicholson Annual Report evaluation process. What are pro forma statements; off balance items; recurring and non-recurring items; misleading revenue tactics?

Univ. of Phoenix, Room 104 (1/2 day class. Cost \$35).

(301) All Day Stock Screening Workshop

Apr. 26, 9:30am—4:30pm **Instrs.:** Gillogly/Harris/Reddie
The morning covers stock screening concepts and the formulation of several screens. The afternoon is devoted to screening with NAIC Stock Prospector software.

Univ. of Phoenix, Room 104 (1 day class. Cost \$50).

(105) Mutual Fund Investing the NAIC Way

May 3, 9:30 am—4:30 pm **Instructor:** Harris/Kemp
 Background: 100
Introduction to mutual fund investing and relating it to your total portfolio return.

GMU, Arlington, Room 115 (1 day class. Cost \$50).

January, February, March & May Class location: **George Mason University Professional Center**, 3401 N. Fairfax Drive, Arlington, VA, adjacent to the Virginia Square/GMU Metro Station. Free parking on Saturdays. Please call the Center at 703-993-8140 for directions or get a map of the location from the web at:

<http://coyote.gmu.edu/map/arling.html>

(401) Cash Flow as an Investment Tool

May 10, 9:30am—12:30pm **Instructor:** Lucas
Examine computation of cash flow and its three sources and how it can be used as an additional investment tool.
GMU, Arlington, Room 115 (1/2 day class. Cost \$35).

New Club and First-Year Club Workshop

May 10, 1:30pm—4:30pm **Instructor:** Gillogly
Learn the proper procedures of successful club operation. Use of NAIC education methods and accounting software.
GMU, Arlington, Room 115 (1/2 day class. Cost \$10).

Check www.naicdc.org for the latest information.

April Class location: **University of Phoenix**, 9601 Blackwell Rd, Suite 100, Rockville, MD 20850. From I-495 (Beltway), take I-270 West to Exit 8, Shady Grove Rd. Left onto Shady Grove, go approximately .7 miles, turn right onto Blackwell (one block after Key West Blvd./3rd light). Free parking.

Support for Local Chapter

Whenever you renew your NAIC membership, recruit new members or buy NAIC products, you can help your local chapter by using our "K028" number. NAIC returns a percentage of your purchases to the local chapter, when you put **K028** on your checks and order forms. 💰

Zip Code Outreach Program

Looking to find a club to join or seeking new members for an existing club? Come out to a meeting in your area and mingle. No charge.

March 5, 11:00 am, Wednesday, **Financial Information Online**, Mary Riley Styles Library, 120 North Virginia Avenue, Falls Church, VA

March 22, 11:00 am, **One Page Stock Analysis**, Saturday Morning Stock Talks, Arlington Central Library, 1015 N. Quincy Street, Arlington, VA.

April 29, 7:00 pm, Tuesday, **Starting & Running an Investment Club**, Personal Finance Class Series, Virginia Cooperative Extension, Arlington Central Library, 1015 N. Quincy Street, Arlington, VA (Series begins April 8th; call 703-228-6402 to register). <http://offices.ext.va.edu/arlington>.

May 6, 7:30 pm, Tuesday, **Financial Information Online**, Hyattsville Branch Library, 6532 Adelphi Rd., Hyattsville, MD

May 20, 7:30 pm, Tuesday, **Standard & Poor's Net Advantage Online**, Hyattsville Branch Library, 6532 Adelphi Rd., Hyattsville, MD

If your library has a meeting room for 40 or more and you are interested in a program for Fall 2003 or Spring 2004, please contact clubrelations@naicdc.org 💰



D.C. Regional Chapter Course Registration Form - Spring, 2003

Please submit one form per person at least two weeks before class begins. No credit or refunds for missed classes. Transfer to another course request must be made two weeks prior to course date to Director of Education.

Please make check payable to: **DC Regional Chapter - NAIC** and mail with form to:
NAIC Course Registrar, 2334 Oak St., Falls Church, Va. 22046-2326.

Tuition: **\$35** per ½-day class **\$50** per 1-day class **\$80** per 2-day class

COURSE NAME _____ Course Date _____

Your Name _____

Address _____

City _____ State _____ ZIP Code _____

E-mail Address _____

Phone Number _____ Amount Enclosed _____

Member Referral Program

1. Help yourself by using NAIC Dollars to reduce the cost of renewing your membership, or purchasing products and services.
2. You can help others you know start a lifetime investment program – the NAIC way.
3. Help NAIC fulfill our vision of creating a nation of knowledgeable individual investors.

For more information on this new program, check the latest copy of **Better Investing** or go to www.better-investing.org. 💰

Latest Chapter News

To find the latest chapter news, go to www.naicdc.org. Postcards are sent on a monthly basis to club contacts. Do you know who your club contact is? The same information is sent via email to the Chapter Announcements Email List. You can sign up online at www.naicdc.org, in the Chapter Announcements Email List section. Twice a year, **Capitol Investor News** is mailed to all members of the DC Regional Chapter and is available online as a PDF file. 💰

Chapter Background

The NAIC DC Regional Chapter is the regional, volunteer arm of the National Association of Investors Corporation. NAIC encourages direct ownership of common stocks by individuals and investment clubs and provides a learn-by-doing investment education program for both individuals and clubs.

The DC Regional Chapter, a 501-C3, not-for-profit organization, celebrates its **40th anniversary** in 2003 and consists of over 9000 members in the Washington, DC metropolitan area, with nearly 100 youth members.

In order to assure your interests are being served, the chapter would like to hear from you as it plans for Fall 2003 and Spring 2004. What kind of programs would you like to see? What topics do you want covered? Send your comments to education@naicdc.org

A Board of Directors, all volunteers; manages the chapter and is always in need of additional volunteers. Writing, layout and design, database design and maintenance, course development, teaching and general support are just some of the skills needed. If you are interested in participating at the board level, please contact training@naicdc.org. 💰

CAPITOL INVESTOR NEWS

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