

# Kansas City Area Chapter Newsletter



NATIONAL ASSOCIATION OF INVESTORS CORPORATION

## BETTER INVESTING™

The Leader In Investment Education

Vol. 19 No. 2

Winter 2007

### INSIDE

Class Schedules	2
Special Classes & SSG	
Workshops	2-3
Registration Form	3
How to Contact Us	4

### CALENDAR

#### **BetterInvesting National Convention**

June 21-24, 2007  
Dallas, Texas

#### **Investors Fair®**

April 27-28, 2007

Doubletree Hotel,  
Overland Park, KS

### REGISTER NOW!!

#### **BETTERINVESTING CLASSES:**

#### **Fall 2006—Spring 2007**

Find the registration form in this newsletter and at [www.betterinvesting.org/chapters/kansas](http://www.betterinvesting.org/chapters/kansas).

Members receive a discount if they include the digits after hyphen on the BetterInvesting label.

## ***The PRESIDENT'S MESSAGE***

### *Reflecting Back – Preparing for the Future*

Once again we are at the time when we think about the events of last year and our hopes and resolutions for the new year. What went right? What needs attention? These are good questions when managing an investment portfolio as well.

Looking back, the Chapter held its Annual Meeting in September. Cerner shared their headquarters and story with us. It was an interesting morning with a company that has a lot of opportunities. We thank Cerner for their hospitality.

Local companies, like

Cerner, can be fun to own as they are frequently covered in the local news. While this can be beneficial, it also can be distracting. Small contracts won or lost and other relatively insignificant events may get more coverage, at least more than you may encounter with other stocks. The challenge is deciding what is really important for managing the investment.

Helping you learn how to manage investments and a portfolio are why we are here. While our education calendar is half over, we have a lot of events scheduled for the first half of 2007. Check it out for help with portfolio



Dennis  
Boatright

President,  
KC Area  
Chapter

management, club accounting, stock evaluation, and investment ideas with the opportunity to hear more company stories at the Investors Fair. Of course, you may always call or email us with specific questions. Please take advantage of these opportunities.

Happy New Year!  
*Dennis Boatright*

## ***Plan Now for the 24th Annual KCBI Investors Fair***

Make your plans now to attend the 24th annual KCBI Investors Fair scheduled for April 27-28, 2007 at the Doubletree Hotel, 10100 College Blvd., in Overland Park, Kan. The informational event will kick off at 5 p.m. with registration, followed by educational seminars, company presentations, and a featured speaker.

The Fair will continue at 7 a.m. on April 28 with a continental breakfast as you browse through the popular Showcase Gallery, then listen to intriguing corporate presentations and a guest speaker. Drawings for door

prizes will be offered throughout the event. Look for more details on guests speakers, corporate presentations, and seminars in the Investors Fair brochure scheduled to be distributed in mid-March.

Cost to attend the 24th Investors Fair will be \$50 for BI/NAIC members and \$55/non-members for both days and \$40 and \$45, respectively, for Saturday only. Clubs registering five members or more at the same time pay \$45 per member for both days.

## Teaching Stock Selection Guide Classes

### “Doing and Understanding the Stock Selection Guide”

The Kansas City Chapter of BI again will use BetterInvesting software to teach the Stock Selection Guide (SSG). Emphasis will be on understanding the SSG using suggested research sites found on the internet, judgment and importing the data using Online Premium Service (OPS). For those who would still like to complete the SSG manually the SSG III class will be offered.

All of the SSG classes are progressive – each assuming you have an understanding of the information in the previous class. If you are new to investing we recommend that you begin with the **Basic Investing** class and continue with **SSG I and SSG II**. **SSG III** is designed for persons wanting to learn how to complete the SSG by hand vs. the software. SSG I & II can also be used as a refresher course if you need a brush up on your understanding of the SSG. Please bring pens or pencils and calculators to all classes.

A printed Power Point handout of each class presentation will be provided. The green *Stock Selection Handbook* will be provided at no additional cost to all **Basic Investing** students. The Stock Selection Handbook will be available for purchase at the SSG I, II & III classes for \$15, or you can purchase it online at [www.betterinvesting.org](http://www.betterinvesting.org) before attending classes.

**Basic Investing:** Lasts four hours, 8:45 a.m. to 12:45 p.m. on Saturdays. This class is for those new to investing and includes the Stock Check List, Value Line, discussion of investment terms, such as revenues, earnings and dividends.

**Jan. 20, 2007** Lenexa Community Center,  
13420 Oak, Lenexa, KS

**SSG I:** Lasts four hours 8:45 a.m.—12:45 p.m. on Saturdays, unless otherwise noted\*. Class is for those who understand basic investing terms and emphasizes evaluating the fundamentals of a growth company, adding judgment using suggested research sources and projecting future growth using the Toolkit 5.x software.

**Feb. 17, 2007** Lenexa Community Center  
13420 Oak, Lenexa, KS

**SSG II:** Lasts four hours, 8:45 a.m.—12:45 p.m. on Saturdays. Covers selecting a “good” price to pay for the company. Understanding total return and how the “buy” price affects total return. Uses various examples of completed SSGs to compare and contrast companies.

**Feb. 24, 2007** Lenexa Community Center,  
13420 Oak, Lenexa, KS

**SSG III:** Lasts four hours, 8:45 a.m. to 12:45 p.m. on Saturdays. In this class you will use your colored pencils, rulers and calculators to do the math and fill in the SSG form by hand rather than use the software.

**March 10, 2007** Lenexa Community Center,  
13420 Oak, Lenexa, KS

**KC Area Treasurers Workshop:** This workshop features computerized bookkeeping, using BI’s 3.x Accounting software. The session is important since it requires Windows XP or Windows 2000 to run and will be the only program that will work with the tax printer. Session will be held from **9 a.m.-3 p.m. on Jan. 27, 2007 at the Lenexa Community Center, 13420 Oak, Lenexa, KS. Cost is \$15, lunch is on your own.**

**Stock Selection Guide Workshop:** This workshop is a review of SSG concepts, but on a topic not presented in the SSG courses. The first hour features a prepared presentation that includes one of the SSG software products. The second hour is open for requests and questions from attendees.

The next workshop will be on “Valuing a Quality Stock” and held from **9:30-11:30 a.m. on April 14, 2007 at Felton Medical, Inc., 9084 Bond, Overland Park, KS. Cost is \$15.**

**Open Model Club Meetings:** Come and observe an experienced investment club in action. After the meeting, club members will answer your questions about starting a club and keeping it going. All open meetings are **free** and open to the public. No registration is needed.

**Open meetings will be held from 6:30-8:30 p.m. at Antioch Library, 8700 Shawnee Mission Parkway, Overland Park, KS, on Feb. 19 and May 21, 2007.**

## REGISTRATION FORM

Registration is limited to the first 35 people who submit this form and payment or register online for the course(s) selected. Classes may be cancelled if fewer than 20 people register. Registration needs to be received by no later than 7 days prior to date of class. You will be charged \$10 extra if you register for a class at the door. **Your cancelled check is your receipt.** If a session is full, your check will be returned. If you wish to be notified of your registration, you may send a self-addressed, stamped envelope. **Free programs are not listed on the registration form. Please notify the KC BI Chapter 45 days in advance of a class of any special accommodations you may require. Please state your specific needs. To qualify for a BI discount, include your BI number, which is after the hyphen on the mailing label on your BetterInvesting magazine. You *must* provide this number to receive the member rate.**

**Sessions in 2007:**

- Jan. 20:** Basic Investing, Lenexa Community Center (KS) \_\_\_\_\_ \$25 with ID# \_\_\_\_\_ \$30 no ID #
- Jan. 27:** Treasurers Workshop, Lenexa Community Center \_\_\_\_\_ \$15, lunch on your own
- Feb. 3:** Treasurers Workshop, Topeka (KS) \_\_\_\_\_ \$15, lunch on your own
- Feb. 10:** Treasurers Workshop, Columbia (MO) \_\_\_\_\_ \$15, lunch on your own
- Feb. 17:** SSG I, Lenexa Community Center (KS) \_\_\_\_\_ \$25 with ID # \_\_\_\_\_ \$30 no ID #
- Feb. 24:** SSG II, Lenexa Community Center (KS) \_\_\_\_\_ \$25 with ID # \_\_\_\_\_ \$30 no ID #
- March 10:** SSG III, Lenexa Community Center (KS) \_\_\_\_\_ \$25 with ID # \_\_\_\_\_ \$30 no ID #
- March 10:** Portfolio Management, Columbia (MO) \_\_\_\_\_ \$25 with ID# \_\_\_\_\_ \$30 no ID #
- April 14:** SSG Workshop, Felton Medical, Inc. (KS) \_\_\_\_\_ \$15
- April 27-28:** Investors Fair, Doubletree Hotel (KS) \_\_\_\_\_ \$50 with ID# \_\_\_\_\_ \$55 no ID #

Be sure to list all additional names, addresses & NAIC numbers, if applicable, on a separate sheet, so materials will be ready and a place reserved. Make checks payable to NAIC. **Send this form and payment to NAIC, P. O. Box 25071, Shawnee Mission, KS 66225.**

Name \_\_\_\_\_ BI number: \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-mail address \_\_\_\_\_ Phone ( ) \_\_\_\_\_

\$ \_\_\_\_\_ Total Amount Enclosed

### KC BI CHAPTER REGIONAL PROGRAMS

**Topeka, Kansas: Treasurers Workshop**

(See description under KC Area Treasurer Workshop)  
Session will be held from **9 a.m.—3 p.m. on Feb. 3, 2007 at the Coldwell Banker Building, 2222 SW 29th St., Topeka, KS.**

**Columbia, Missouri: Treasurers Workshop**

Session will be held from **9:30 a.m.—3:30 p.m. on Feb. 10, 2007 at Townsend Hall on the MU campus.**

***Portfolio Management Class* — This new class uses BI software: Portfolio Management Guide, PERT and Challenge Tree to demonstrate how to successfully manage a portfolio. Also learn how and when to sell. Session runs from 10 a.m. - 3 p.m. on March 10, 2007. Cost is \$25/\$30.**

### KC BI Special Services

***Customized SSG Sessions:*** Area investment clubs can have a customized SSG I & II program presented to them by simply requesting it. The club will need to secure the location and work out a mutually agreed upon date for the session with a KC BI director, who will teach the front and back of the SSG using the Toolkit 5 program. The cost is \$20/person with a minimum of 10 persons or \$200.

The program will last about five or six hours and handouts will be provided. To schedule your session, call or email a director in your area using the directory on the back page of this newsletter.

**KC BI® DIRECTORS**

Judy Stokes, Chairman.....	816-741-6764 .....	plcotreas@aol.com
Dennis Boatright, President.....	816-478-0718 .....	dboatright4@comcast.net
Tom Reid, Vice President.....	913-888-7836 .....	tomreid2@hotmail.com
Judy Weeks, Treasurer .....	816-741-0724.....	jaweeks99@yahoo.com
Marian Whirley, Secretary .....	913-888-9276.....	mwhirley@everestkc.net
Warren Abbott, Topeka .....	785-554-1466.....	watoes@cox.net
Ann Borel, Topeka .....	785-273-9978 .....	aborel@cox.net
Richard Clark, KC Internet .....	913-894-6488 .....	richard9clark@yahoo.com
Bob Easton, Publicity .....	816-941-9409 .....	bob.easton@marriott.com
Arthur Gordon, Investors Fair .....	913-829-4471 .....	a.gordon2@sbcglobal.net
Linda Hunsucker, Publicity .....	913-894-9316.....	lkhbkpr@netzero.net
Roxane Johnson, Newsletter .....	816-517-1527 .....	1122johnson@sbcglobal.net
John Kimmel, Wichita .....	316-686-2731 .....	johnkimmel@cox.net
Al Mueller, Leavenworth .....	913-682-1440 .....	alcmueller@earthlink.net
Connie Rehm, St. Joseph .....	816-324-4939 .....	c3j10r@lycos.com
Becky Sandring, Investors Fair .....	816-478-0718.....	dboatright4@comcast.net
Joe Sestak, Columbia .....	573-445-0001 .....	sestso@mchsi.com
Janice Stonestreet, Investors Fair..	913-451-0620.....	k5stoney7@aol.com
Betty Stump, Wichita .....	316-722-3975.....	elstump@cox.net
Fred Tonnies, Columbia .....	573-445-6556 .....	tonnies@missouri.edu
Sheila Wyss .....	816-228-2811 .....	swyss@swbell.net

Pat Elrod — Director Emeritus

Log in on KC Chapter's website for events or current updates:  
[www.betterinvesting.org/chapters/kansas](http://www.betterinvesting.org/chapters/kansas).

**Home Office, Michigan: 1-877-ASK-NAIC (1-877-275-6242) toll free**

**NEW on KC Chapter Webpage**

This year the KC BI Chapter will add a news page and chat list for the Columbia, Mo., and Wichita, Kan. areas to the existing KC News List and KC Chat List.

Investors living within a 100-mile radius of those cities can sign up to receive emails that update you on BI classes and events offered in those cities.

To sign up for this new service, log on [www.betterinvesting.org/chapters/kansas/lists](http://www.betterinvesting.org/chapters/kansas/lists).

**Sign Up Now Online!**

You can enroll in KC BI classes and programs online at:  
[www.betterinvesting.org/chapters/kansas](http://www.betterinvesting.org/chapters/kansas).

NON-PROFIT  
 ORGANIZATION  
 U.S. POSTAGE  
**PAID**  
 MARKETING  
 TECHNOLOGIES

**NEWSLETTER**  
 KANSAS CITY NAIC  
 P.O. BOX 25071  
 SHAWNEE MISSION, KS 66225

**BETTER INVESTING**  
 The Leader in Investment Education