



# CAPITOL INVESTOR NEWS

Spring 2004

## From Your President

Happy New Year! As 2003 comes to a close, we want to thank all our members for another remarkable year. We look forward to a healthy and prosperous 2004 for our country, chapter and portfolios. We are excited to be bringing back the Investors Fair and the Portfolio Contest. Check the insert for our dynamic Fair program and top-notch speakers for a day not to be missed.

The past several years have been a challenge for many of us. Individual investors and investment club members have been scratching their heads, not knowing whether to buy or sell. As the economy goes up, then down, then up again, we must stay focused on our ultimate goals and remember the fundamentals. Borrowing from the theme of our April 2004 Investors' Fair, we have to REGROUP AND RECOUP!

NAIC principles have worked for the last 60 years for thousands of private investors and still hold true.

- Invest regularly
- Diversify your investments
- Look for stocks to buy using the Stock Selection Guide.
- Monitor your portfolio; weed out the companies that are not performing to your expectations.
- Watch the news, good or bad, on the companies you own or are thinking to buy.
- Bounce ideas around; discuss companies and the market with your club members, friends, etc.

This is a strategy that many successful long-term investors use to keep abreast of the market. They also use many of the fundamental Investment tools

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Investors Fair, April 24, 2004 – Special 2-page Insert

## Growth Stock Award Winner



Judith Berkey, local member, pictured with David G. Moore, chairman and CEO of Corinthian Colleges, Inc., wins the annual Growth Stock Award with COCO. See her winning submission at [www.naicdc.org](http://www.naicdc.org). \$

## Club Portfolio Contest

After a brief vacation the DC Regional Portfolio Contest returns. All area clubs are invited to participate. For complete information on contest rules, submission deadline, and cash prizes see our chapter web site at [www.naicdc.org](http://www.naicdc.org). First place winners in all four categories will be invited to discuss their club's portfolios at our annual meeting May 15, 2004. \$

## Saturday, January 17 Pre-register for Spring Classes

Come to George Mason University, 3401 N. Fairfax Drive, Arlington, VA, between 9:30 am and 1:30 pm to meet this year's instructors and pre-register for spring classes. We are again offering a \$5.00 savings on the cost of each ½-day, 1-day, or 2-day course. There will be a special program at 10:30 a.m. featuring the **Stock To Study** program begun last fall and continuing this spring. Yankee Candle (YCC) is the January Stock To Study in *Better Investing Magazine* and will be analyzed. Feel free to bring your own SSG and partake in a lively discussion. See page 4 for more details on the monthly program. Additional information is available online at [www.naicdc.org](http://www.naicdc.org). \$

## Spring 2004 Education Program Schedule

### (185) Year-End Club Accounting

Jan. 31, 9:30am—12:30pm

Background: None. Instructors: Lucas /Gillgoly  
*Review the steps required prior to completing Federal 1065 and K-1 forms; reconcile differences in club records with broker monthly statements. Please bring 12/31/03 broker statement.*

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

### (100) Basic Investment Concepts

Jan. 31, 1:30pm—4:30pm

Background: None. Instructor: Garrish/Wiener  
*The power of investing; risk vs. reward; 4 principles of NAIC-styled investing; recognize quality companies using the One Page Quick Analysis. (Pre-requisite for the 2-day SSG class.)*

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

### (200) Manual SSG—2 Saturdays

Feb. 7 & Feb. 14; 9:30am—4:30pm

Background: 100. Instructors: Tanoë/Gillgoly  
*For beginning investors. Covers NAIC's fundamental analysis tool—SSG—how to prepare and use it to improve your investing skills.*

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

### (150) Annual Reports

Feb. 21, 1:30pm—4:30pm

Background: None. Instructor: Lucas  
*Determine what is important in a report. What are Pro Forma statements? Off-balance sheet items? Recurring and non-recurring expenses? Misleading revenue tactics? For the beginner.*

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

### (250) Stock Analyst+ Software

Feb. 27, 7:00pm—9:30pm Instructor: Douglas Gerlach

Background: 200. *Learn how to use the software favored by experienced investors that incorporates advanced SSG concepts and balance sheet items; also imports Online Premium Service data directly.*

Parks College, Arlington, 5<sup>th</sup> Floor  
 (Evening class, Cost \$25.)

### (191) Online Company Research

Feb. 28, 9:30am—12:30pm

Background: None. Instructor: Douglas Gerlach  
*NAIC guest instructor reviews his favorite ways to research a company using the Internet. He will incorporate points made in his new NAIC book: Computers and the Internet.*

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

### (315) Beyond the SSG

Feb. 28, 1:30pm—4:30pm

Background: 200. Instructor: Douglas Gerlach  
*Instructor will review additional economic, industrial and company-specific factors important for forming good judgments on the SSG.*

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

### (320) Finding Stocks in Any Market

Mar. 6, 9:00am—12:00pm

Background: 200. Instructor: Goodhart  
*Find companies using screening software from both the Prospector software and the free MultexInvestor website.*

Parks College, Arlington, 5<sup>th</sup> Floor  
 (1/2 day class. \$35.)

### (330) Beaubien's Portfolio Management

Mar. 12, 7:00pm—9:30pm

Background: 200 Instructor: Rich Beaubien  
 VP Investment Products ICLUB Central  
*Rich Beaubien's personal—and highly effective—method for measuring how well his stocks are meeting his growth estimates. Easy to do!*

Parks College, Arlington, 5<sup>th</sup> Floor  
 (Evening class. \$25.)

### (180) Investment Club Accounting

Mar. 13, 9:30am—4:30pm

Background: None. Instructor: Rich Beaubien  
*IClub accounting expert teaches use of stand-alone and online club accounting software: basic transactions; monthly reports; withdrawals. Bring questions, problems.*

Univ. of Phoenix, Rockville, Room 104  
 (All-day class. \$50.)

### (130) Almost a Model Club Workshop

Mar. 20, 1:30pm—4:30pm

Background: None. Instructor: Gillgoly  
*Are you doing everything right? How would your club compare with a well-run (or model) club? This workshop will help improve your club's operation.*

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

### (210) Using Toolkit 4.0 Basic

Apr. 3, 9:30am—12:30pm

Background: 200 Instructor: Wiener  
*Learn the key features of Toolkit 4.x to complete a stock analysis.*

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

*\*Please bring pencil, ruler, calculator,  
 and highlighter to all classes \**

**(110) Value Line and NAIC Applications**

Apr 3, 1:30pm—4:30pm

Background: None. Instructor: Murphy  
Use the Value Line report to find data for the SSG and to form NAIC styled-judgment about the quality and value of a company.

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

**(215) Using NAIC Classic software**

May 1, 9:30am—12:30pm

Background: 200. Instructor: Gillogly  
*Learn to use NAIC's beginner software. Focus is on completing a SSG electronically for the beginning investor. Shows the key features of the program.*

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

**(115) Finding Stocks to Study**

May 1, 1:30pm—4:30pm

Background: None. Instructors: Gillogly/Murphy  
*Use the best NAIC-styled stock screens; hidden gems of the NAIC magazine & website; Online Premium Service (OPS); and more.*

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

**(175) Mutual Fund Investing the NAIC Way**

May 8, 9:30am—4:30pm

Background: None. Instructors: Harris/Tanoe/Garrish  
*Improve your mutual fund return using NAIC approved methods and forms.*

GMU, Arlington, Room 105A  
All-day class. Cost \$50.)

## Class Locations

**George Mason University Professional Center**, 3401 N. Fairfax Drive, Arlington, VA 22201.

**Parks College**, 801 N. Quincy Street, Arlington, VA 22203

**University of Phoenix**, 9601 Blackwell Rd, Suite 100, Rockville, MD 20850

Detailed directions and maps online, [www.naicdc.org](http://www.naicdc.org)

*President's letter continued*  
espoused by NAIC, including the new Better Investing Book Series, premier publications that contain information and resources for the beginning, intermediate and experienced investor. The NAIC National website ([www.better-investing.org](http://www.better-investing.org)) has further book descriptions as well as many offerings to help you become a wise investor. Our own DC Chapter website, [www.naicdc.org](http://www.naicdc.org) not only has our spring education class schedule and other area programs but also articles to enhance your investment decision-making. And lastly, if you haven't done so already, sign up on our website in the Chapter Email Lists section for the once-a-month DC News email list to keep up with the latest chapter news.  
  
I wish you all a very successful year of better investing!  
  
*Benay Glymph, President* ☺

### D.C. Regional Chapter Course Registration Form - Spring, 2004

Please submit one form per person at least two weeks before class begins. Credit, refunds or transfers to another course need to be arranged with the Director of Education, [education@naicdc.org](mailto:education@naicdc.org). Please make check payable to: **DC Regional Chapter-NAIC** and mail with form to: **Course Registrar, 2334 Oak St., Falls Church, Va. 22046-2326.**

Course Title and #: \_\_\_\_\_ Course Date: \_\_\_\_\_

Your Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Use only in reference to this class.  You may send me the monthly DC Regional News Announcement.

(A response to the [dc-naic-news](#) email confirmation request is required).

Phone Number: \_\_\_\_\_ Amount Enclosed: \_\_\_\_\_

## Stock to Study – free series continues

Investors! Sharpen your skills. Come out the third Tuesday of the month, February, March, and April, 7:30pm to 8:30pm to analyze the **Stock to Study** featured in the **Better Investing** magazine for that month. Here's how it works: do your own analysis, complete an SSG, and bring it to the meeting, where the group will complete the SSG, and you may compare your judgments with those of other investors. This is a great way to sharpen your analytic skills as well as meet with other NAIC members, recruit for clubs, etc. There will be a \$2 admission fee for coming without a completed SSG.

February 17: Tysons-Pimmit Regional Library,  
Falls Church, VA

March 16: Reston Regional Library, Reston, VA,

April 20: Tysons-Pimmit Regional Library,  
Falls Church, VA.

Look for the program to start in Maryland in March. Check the chapter website, [www.naicdc.org](http://www.naicdc.org) for time and place plus full directions to both Virginia and Maryland locations. \$

## 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 not-for-profit 501(c)3 organization, has been active for more than 40 years and consists of over 8000 members in the Washington, DC metropolitan area, with nearly 800 clubs. \$

## Annual Meeting – May 15<sup>th</sup> 9:30am – 11:30am

Guest Speaker	Door Prizes	Refreshments
Portfolio Contest Winners		Chapter Elections
Make a Club Connection		No Charge

Special postcard sent in April with more information. GMU, Arlington, Room 115. Free parking. \$

# CAPITOL INVESTOR NEWS

D. C. Regional Chapter – NAIC  
P. O. Box 5457  
Arlington, VA 22205

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## TIME DATED MATERIAL

<b>INVESTORS FAIR 2004</b>
<b>APRIL 24, 2004</b>
<b>25<sup>TH</sup> INVESTORS CONFERENCE</b>
<b>ERNST COMMUNITY CENTER, NVCC, Annandale, VA</b>