



CAPITOL INVESTOR NEWS

www.naicdc.org

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Spring 2007

From Your President

An important component for building wealth thru stock ownership is time in the market, not timing the market. By picking quality stocks at a reasonable price, members of the BetterInvesting™ community work to surpass the market average. Through classes, meetings, regional and national conferences, participants acquire valuable investment tools for building wealth while minimizing risk.

The DC Chapter has a full schedule of classes beginning in January and listed on page two of this newsletter. Taking a class is a wonderful way to meet other individual investors and share ideas. There are also many free events advertised in this newsletter.

One reason I began volunteering for the DC Regional Chapter was to meet people more knowledgeable about investing than myself. I have been fortunate to work with many of the BetterInvesting™ community experts and learn from them. Consider joining us.

Kathryn Reddie, President
DC Regional Chapter-BetterInvesting™.

Chapter Open House

January 20, 9:00 AM – 1:00 PM

Maximize your BetterInvesting™ membership! Meet with chapter directors and other like-minded investors. Bring your questions to the software cyber café and discover the best gems from the BetterInvesting™ Web site. Find out about the Chapter's new Virtual Investment Model Club. Bring a friend and enjoy complimentary refreshments. **Save \$5.00 off of each class** you register for on this day. UVA Virginia Center, 7054 Haycock Road, Falls Church, (West Falls Church Metro). Cost: Free.

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Investors EduFair – A Success

On November 11th over 150 investors gathered in Falls Church to hear local and national instructors talk about investment ideas from “why investing our way works” to “developing a strategy for selling.”

Ellis Traub, author of Take \$tock and developer of the Toolkit Software, joined us from Florida. His classes were standing-room only. His ideas on stock analysis are unparalleled.



See the web site for a complete list of presentations: www.naicdc.org.

Energized by the response of participants, the DC Chapter plans to hold another Investors EduFair next fall on October 20th, 2007. Mark your calendars and watch for news on our web site: www.naicdc.org.

Mark Your Calendar Club Appreciation Day

February 17th, 2007

The DC Chapter will celebrate the anniversaries of long running clubs. Come learn from their experiences and network with all members. See software demonstrations at the cyber café. Time: 9:30 am to 12:30 PM, Arlington Central Library, 1015 N. Quincy Street, 22201. Is your club going to be honored? Confirm your anniversary date online. Visit www.naicdc.org/events to learn more. Cost: Free.

Annual Meeting

May 12th, 2007

Value Investing for Improved Portfolio Return by Bob Pugh, CFA, Insight Wealth Management. Bob is a member of the Practitioner Faculty, Johns Hopkins University's Graduate Business Division and President of the CFA Society of Washington, DC. Join us for elections and refreshments, 9:00 am to 12 pm, UVA, Virginia Center, Falls Church, VA. Cost: Free.

Investor's EduFair

October 20th, 2007

George Mason Jr.-Sr. High School
7124 Leesburg Pike, Falls Church, VA 22043.

Spring 2007 Education Program Schedule

(100) Basic Investment Concepts

January 27, 9am—12pm

Background: None.

Instructor: Harris

The power of investing; risk vs. reward; 4 principles of BetterInvesting™ style investing; recognize quality companies using the One Page Quick Analysis. (Pre-requisite for the 2-day Stock Selection Guide (SSG) class.)

Univ. of Phoenix, Rockville

(1/2 day class. Cost \$35)

(115) Finding Stocks to Study

January 27, 1pm—4pm

Background: None.

Instructors: Murphy/Hathaway

Learn to use the latest in BetterInvesting™ investing tools: find the best BetterInvesting™ style stock screens; hidden gems of the BetterInvesting™ magazine & website; how to use the S&P Stock Data Service; how to use S&P Reports; & much more.

Univ. of Phoenix, Rockville

(1/2 day class. Cost \$35)

(180) Year-End Club Accounting

February 3, 9am—11am

Background: None.

Instructor: Gillogly

Don't let the tax man get you! Review the steps required prior to completing Federal 1065 and K-1 forms; reconcile differences in club records with broker monthly statements. Bring your questions, your 12/31/06 broker statement.

Univ. of Phoenix, Rockville

(2 hour class. \$20)

(130) Investment Club Management

February 3, 11am—1pm.

Background: None.

Instructor: Gillogly

Is your club running as well as it can? Get ideas, tips, and hints for making your group motivated, involved, and successful. Exchanged ideas!

Univ. of Phoenix, Rockville

(2 hour class. \$20.)

(200) Basic SSG Using BetterInvesting™ Software

Two Saturdays

February 24 & March 3, 9am—4pm

Background: 100.

Instructors: Kimberlin/Clements

For beginning investors. Understand the concepts behind the BetterInvesting™ fundamental analysis tool, the Stock Selection Guide (SSG), using approved software by BetterInvesting™.

UVA Virginia Center, Falls Church

(2 day class. Cost \$80.)

(300) Improving Judgment on the SSG

March 24, 9am—12pm

Background: 200.

Instructor: Gillogly

Not just another class but a hands-on experience on how to use the Stock Selection Guide (SSG). Class is designed to help investors improve their judgment skills on the SSG judgment points.

Univ. of Phoenix, Rockville, Room 104

(1/2 day class. Cost \$35.)

(300) Maintaining a Growth Stock Portfolio

March 24, 1pm—4pm

Background: 200.

Instructor: Hughes

Learn how to maintain a portfolio of growing companies. Will include portfolio management and evaluation strategies.

Univ. of Phoenix, Rockville, Room 104

(1/2 day class: Cost \$35)

(303) Finding your Own Investment Strategy

April 14, 9am—12pm

Background: 200

Instructor: Refour

Learn how to enhance your investment decisions by exploring different investment concepts and incorporating available information to improve your judgments. The goal is for each student to arrive at his/her investment strategy to maximize investment gains. This class expands on prior judgment courses offered.

Virginia Center, Falls Church

(1/2 day class: Cost \$35)

(250) REITS: Real Estate Investment Trusts

April 14, 1pm—4pm

Background: 200

Instructor: Rob Valero

Learn how REITs operate and how to analyze them. Is there a place in your portfolio for them? Rob joins us from the National Association of Real Estate Investment Trusts, www.nareit.com.

Virginia Center, Falls Church

(1/2 day class: Cost \$35)

(155) How to Get the Most from the S&P Reports

April 21, 1 pm—4pm

Background: 200

Instructors: Gillogly/Williams

S&P has markedly improved their Stock Reports. Learn how to make the best use of them to complete your stock studies when determining the quality and value of a company.

Univ. of Phoenix, Rockville, Room 104

(1/2 day class: Cost \$35)

304 Weeding and Feeding Your Portfolio: Buy or Sell

May 12, 1pm-4pm

Background: 200

Instructor: Goodhart

Use the Investor's Toolkit Portfolio Summary Report to categorize stock holdings, the portfolio offense and defense reports to spotlight issues that need attention, and the PERT and Portfolio Trend reports to rank holdings on key fundamental factors. Learn why and when to sell and how to use the "Challenger" to find replacement stocks.

UVA Virginia Center, Falls Church

(1/2 day class. Cost \$35.)

Class Locations

Univ. of Virginia – Northern Virginia Center
7054 Haycock Rd., Falls Church, VA 22043
(West Falls Church Metro /Orange Line).

University of Phoenix
9601 Blackwell Rd, Rockville, MD 20850
(From I-495 (Beltway), take I-270 West to Exit 8,
Shady Grove Road West. Right turn .7 miles.

Go to: www.naicdc.org for detailed directions/maps.

❖ Please bring pencil, ruler, calculator
and highlighter to all classes.

Free Monthly Programs

The popular Stock-to-Study sessions will only be held at some of the locations listed below. The Model Investment Club (see last page of the newsletter) will be held in Virginia. Join us at these events to sharpen your investing skills. The BetterInvesting™ Magazine has the stock to study each month. Attendees are asked to bring a completed SSG. Time: 7:30—8:30pm. Check www.naicdc.org for the stock to be studied or featured presentation.

First Wednesday of the month: Fidelity Investments, Air Rights Bldg., 7315 Wisconsin Ave., Bethesda, MD 20814. Stock-to-Study.

Second Tuesday of the month: Tysons-Pimmit Regional Library, 7584 Leesburg Pike, Falls Church, VA 22043 Model Investment Club Sessions.

Third Wednesday of the month: Martin Luther King, Jr. Memorial Library, corner of 9th & G Sts., NW, Wash., DC. Stock-to-Study.

Third Thursday of the month: Bowie Public Library, 15210 Annapolis Rd., Bowie, MD 20715. Stock-to-Study.

Register Online with PayPal

We have a quicker and more efficient way of registering for classes at www.naicdc.org/events. Highlight the class you want to take and follow the steps to easy on-line registration using PayPal. The deadline for using PayPal is 2 days prior instead of 1 week prior for regular mail.



The U.S. Financial Literacy and Education Commission provides financial education resources for all Americans. "mymoney" is your one-stop website and toll-free telephone access to materials from across the spectrum of 20 federal agencies that deal with financial issues and markets

The NBC 4 Health and Fitness Expo -Your Financial Health

Improve your financial health by visiting the "Your Financial Health" section of the NBC4 Expo. The DC Regional Chapter of BetterInvesting™ and 11 other not-for-profit financial organizations join forces at the largest health expo on the east coast, Washington Convention Center, January 13 and 14, 9 am – 5 pm. <http://www.nbc4.com/healthandfitnessexpo>

BetterInvesting™ DC Regional Chapter Course Registration Form – Spring 2007

Please submit one form per class at least one week before class begins, 2-day online registration deadline. No credit or refunds for missed classes. Request transfer to another course two weeks prior to course date from the Director of Education, education@naicdc.org. Please make check payable to: **DC Regional Chapter - NAIC** and mail with form to: BetterInvesting™ 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 _____

Use only in reference to this class. Send me the monthly DC Regional News Announcement.
(Response to the **dc-naic-news** email confirmation request is required).

Phone Number _____ Amount Enclosed _____

Have BI-DC Teach at Your Club

Can't get to our Saturday classes? Then see if BetterInvesting DC can come to you. Subject to instructor availability, we will teach our regular classes in front of clubs. We offer flexibility based on the needs of your club. You supply the room. We supply the rest.

Topics might include:

- How to analyze your portfolio
- Refining judgment on the SSG
- Understanding when to sell
- How to pick a growth stock

You specify what your interests are.

Classes can be either 2½ hours for \$30 per person or 2 hours for \$25 per person. A minimum of six people per class is needed. There is no charge for additional participants. To learn more contact Mary Jo Clark at 71732dot520@earthlink.net.

Support your Chapter

When you start or renew your BetterInvesting™ membership, or buy BI products, you can help your local chapter by using our "K028" number. BI returns a percentage of your purchase to us, when you put **K028** on your checks and order forms.

Monthly Postcards

Every month Headquarters sends a postcard to club contacts with the latest information on the DC Regional Chapter. Is your club in the loop? Who's your club contact?

Model Investment Club

The D.C. Regional Chapter of BetterInvesting™ established the Model Investment Club to provide both new and experienced investors with a forum to discuss stock investments and portfolio management. There is no monetary contribution as the portfolio is "virtual." The Model Investment Club operates both online and at periodic meetings, at area libraries and at monthly chapter meetings. Anyone can participate online or attend any of the Model Investment Club meetings.

The Club follows BetterInvesting™ principles which include these four guidelines:

- Invest a set amount regularly
- Reinvest dividends and capital gains
- Buy growth stocks
- Diversify your portfolio

Learn more by going to <http://tyhughes.net/mic/> or to the DC Chapter web site, www.naicdc.org.

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D. C. Regional Chapter – BetterInvesting™

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TIME DATED MATERIAL

DC Regional Chapter Open House

January 20th
9:00 AM – 1:00 PM

UVA Virginia Center,
Falls Church

(Spring Classes - \$5.00 off)