

Volume 1, Issue 1

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**NAIC**

Investment Education Since 1951

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# Education Fair

**Saturday, November 12, 2005 9:15am - 12:30pm**

**Bettendorf Public Library**

**Fee \$10.00**

This will be another information packed event by the Illowa Chapter. We will have two new topics that should be of interest to individual investors. There will be 4 topics covered, so there will be something for everyone. The last several education fairs have been very well attended.

Sessions to be offered:

Investing for Income - This will cover the many alternatives to CD's and money market accounts. We will cover the pros and cons and tax advantages of corporate, government, and municipal bonds, closed end funds, REIT's, dividend paying stocks, mutual funds, and others.

Exchange traded funds - This is one of the newest and fastest growing areas of the market. There are ETF's that cover every industry, country, and investing style possible. Learn the pros and cons of these funds. Taught by Shane Markum of Ameriprise Investments (formerly American Express).

Stock Ideas - Attendees share their most recent buy and sell ideas with the group.

Troubleshooting the Stock selection Guide - Bring the stocks that you are having problems completing the SSG on. We will examine the problem areas of these stocks. We will discuss these as a group and share ideas and solutions. This will be an excellent chance to work on your judgement for the SSG.

Please join us on Saturday, November 12th at the Bettendorf Library. We would really appreciate if you could let us know if you think you may be attending. We will have coffee and donuts and want to make sure we have enough for everyone.

Please contact Allen to make reservations or if you have questions.

Allen Holdsworth  
email - [aajje@qconline.com](mailto:aajje@qconline.com)  
(309) 754-8870 - evenings and weekends  
(309) 734-1077 - weekdays

## **Notification of Educational Opportunities can be easier than going to our website.**

The Chapter has an educational e-mail list. This list is only sent to people who requested that they be notified of Illowa Buy States - NAIC Investment education opportunities by e-mail. We cannot use the e-mail address that you sent to NAIC.

If you would like to be added please send an e-mail with the request to [aajje@qconline.com](mailto:aajje@qconline.com).

## **Why pre-register?**

The reason behind pre-registration is that the chapter directors have had a few events that we have cancelled in the past because of what we perceived would be poor attendance due to poor pre-registration. For each event chapter directors set up the room, beverages, snacks, speakers and the classes.

We will cancel a class only if we feel we will not have enough attendees to make it worthwhile to have a speaker travel or if the expenditures will out weigh the incoming fees.

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Chapter, NAIC**

Illowa Buy-States  
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The Illowa Buy States Directors meet monthly - the 1st Tuesday of the month at either the South West Branch of the Rock Island Library, 9070 Ridgewood Road, Rock Island, IL 61201 or The Bettendorf Library, second floor. We hold a Stock Study each month, beginning at 6:30 pm. These sessions have been well received in the past. This is an opportunity to meet with other investors and study a stock by using the SSG. Toolkit 5 will be used as well as an LCD projector so that all participants can see and join in the discussion. There is no cost to attend.

The directors will hold their regular monthly meeting at 6 pm. Visitors are welcome to come to both the director's meeting and the Stock Study.

Join our email list to get up to date information about the Illowa Buy States classes and upcoming events. Send an email to Allen Holdsworth at: [aajje@qconline.com](mailto:aajje@qconline.com).

## ILLOWA BUY-STATES CHAPTER DIRECTORS

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Your chapter officers would like to remind you of a feature called "The Club Portfolio Review"! The Chapter will assist your club in a full review of all stocks in your portfolio as well as check and discuss the diversification of the portfolio. We will bring a laptop and LCD projector to the club meeting with all the information necessary to do an SSG on each stock. We will assist and guide the club in finishing SSG's on each stock, but the actual buy and sell decisions will be up to the club members. Our job will be to provide guidelines and unbiased opinions.

The charge to your investment club for this portfolio review will be \$5 per member with a maximum charge of \$50. All monies go to the Chapter to help provide further education and assistance to clubs in our area.

Please contact Allen at 309-754-8870 or e-mail him at [aajje@qconline.com](mailto:aajje@qconline.com) to request a portfolio review or to find out more information about this service and others that the Chapter offers.

Another class the Chapter offers is "Researching stocks on the internet". This class offers how to investigate a stock using different tools that the internet offers. The requirements of this class are a DSL (broadband) connection for Kathy's laptop or any computer with an internet connection.

Contact Kathy Hoepfer to request a club visit at [kjhoepfer@msn.com](mailto:kjhoepfer@msn.com) or 563-370-3037.