

Ark-La-Tex Investor News

Fall 2005

From Your President

The 2004-05 year for the Ark-La-Tex Chapter of Better Investing is coming to a close. On August 31, 2004, the DJIA closed at 10173.92. Almost one year later (at the time of this writing on August 12, 2005) the Dow is at 10612.73 for a difference of up 438.81 points or slightly more than a 4.3% gain. Not a very impressive record.

However, while the DJIA is up only 4%, the S & P 500 is up 11.5%, the Nasdaq Composite up 17.25%, and the Russell 2000 up 20.5%. The average increase of these four indexes is slightly more than 13% and that doesn't take into consideration that the average dividend yield for the Dow hovers around 5%. If you have followed Better Investing principles of investing regularly in good quality growth stocks, reinvested your dividends, and diversified your portfolio, you may have beat these averages, once again proving that the tortoise does win the long term race.

You've probably noticed by now that NAIC has a new look and brand name and is now referred to as **BETTER INVESTING**. The new website was launched in June and in this writer's opinion, the site lost some of its better features. When accessing the website, be sure to scroll down and look near the bottom right of the page for our upcoming chapter activities. If you've registered your e-mail address and zip code, click on "*clubs and chapters*" (top left) to go directly to Ark-La-Tex's site for a list of all activities. Be sure to consult this site for any last minute updates or changes.

It's been a pleasure serving the chapter as President for the past two years, but this will be my last term. I've been invited to join the Computer Group Advisory Board's writers' pool so keep a watchful eye on *BI Magazine* for possible articles starting soon promoting CompuFest 2006 in Reno, Nevada next June.

Happy Investing and hope to see you at our annual meeting September 24, 2005.

La Juan

Annual Meeting

Sept 24, 2005
10:00 – 11:30

The Ark-La-Tex Chapter celebrates its 8th year. Come join us at our annual meeting. All are welcome.

Once again our panel of experts on portfolio management will analyze a club portfolio in terms of weeding and feeding for better performance. Come and watch as they pick out the good and the bad.

Last year's club will be on hand to tell us how if in any way they benefited from their portfolio analysis.

Panel of Experts

Horace White	Nell Perry	Delores Elliott
No Charge \$	Door Prizes	Refreshments
Make a Club Connection		Chapter Elections

Hamilton South Caddo Branch Library

2111 Bert Kouns Industrial Loop

Shreveport, Louisiana 71118 318-687-6824

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2005-2006 Education Program Schedule

ANNUAL MEETING

Sept 24, 2005 **Instructors:** Panel

See description on page 1

Location: Hamilton South Caddo Branch Library
2111 Bert Kouns Industrial Loop
Shreveport, LA 71118

Cost: No Charge

Time: 9:30 (registration open) 10:00 – 11:30

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Stock Screening

Oct. 22, 2005 **Instructor:** La Juan Snider

Does your club utilize the following methods for picking stocks to study each month?

- *Broker recommendation*
- *Tips from friends*
- *B I Magazine*
- *Other financial magazines*
- *Advisory services*
- *Throwing darts at the listings*

While some of these methods are good, it's a good idea to have an alternate backup method so you don't always have to rely on outside sources.

In this workshop, we'll explore criteria to use when searching for stocks and where to look using internet sources and BI approved software such as Take Stock and Prospector.

Location: St Mary of the Pines Catholic Church
1050 Bert Kouns Ind'l Loop
Shreveport, LA 71118
Rms 7, 8, & 9

Cost: \$20.00

Time: 9:30 (registration open) 10:00 – 12:00 Noon

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Club Treasurers' Workshop

Nov. 12, 2005 **Instructor:** Curtis Meaux

*This workshop is designed for all club members to learn how to understand NAIC Club Accounting. Especially beneficial for club treasurers. NCA 3 and NOCA (Online club accounting) will be demonstrated so that any member of your club can accept responsibility of your club's finances without hassle. It's **YOUR** money, learn how to read the return on your investment report.*

Location: St Mary of the Pines Catholic Church
1050 Bert Kouns Ind'l Loop
Shreveport, LA 71118
Rms 7, 8, & 9

Cost: \$20.00

Time: 9:30 (registration open) 10:00 – 12:00

Hands on SSG using Toolkit 5

Jan. 28, 2006

Instructor: Horace White

The Stock Selection Guide is the primary tool that investors who follow NAIC investment guidelines use to determine if a company meets the criteria for investment consideration.

*We will use Investware's Toolkit 5 in a 'hands on' environment. The course is designed to teach SSG fundamentals and how to hone your judgment skills. It is not designed to teach the software. No knowledge of the software is required but **basic computer skills are a MUST.***

Location: Tentatively scheduled for North DeSoto High School. Watch your e-mail announcements for confirmation.

Cost: \$25.00

Time: 9:00 (registration open) 9:30 – 12:00 Noon

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Managing Your Portfolio**Using Pert/PMG**

Feb. 28 2006

Instructor: Horace White

You have just invested in the best 7 stocks in the market using the SSG. Now all you have to do is sit back and watch your money double every 5 years. Right! Well maybe but...

As your personal or club portfolio grows and prospers you become more and more concerned with managing the holdings that you already have. Evaluation and review become the primary focus of larger well-established portfolios.

One tool that the NAIC uses is the Portfolio Evaluation & Review Technique or PERT. Included in the course are:

- *PERT-A Worksheet*
- *PERT-B Worksheet*
- *PERT*
- *PMG*

Location: St Mary of the Pines Catholic Church
1050 Bert Kouns Ind'l Loop
Shreveport, LA 71118
Rms 7, 8, & 9

Cost: \$20.00

Time: 9:00 (registration open) 9:30 – 12:00 Noon

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Introduction to Investing

March 25, 2006

Instructor Dr. Jauquita Hargus

Time and location to be announced.

When to Sell**May 20, 2006****Instructor:** Horace White

Determining when to sell a stock is the hardest decision that has to be made in dealing with your portfolio. This course looks at setting up a portfolio so that you have an exit strategy and the factors that should cause you to consider selling a stock.

Included in the course are:

- Setting your original SSG up to be the basis of a sell decision
- Reasons for selling

Location: St Mary of the Pines Catholic Church
1050 Bert Kouns Ind'l Loop
Shreveport, LA 71118
Rms 7, 8, & 9

Cost: \$20.00

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2006-2007 Schedule

Sept 23, 2006	Annual Meeting	TBA
Oct 28, 2006	Round Robin Discussions	TBA
Nov 18, 2006	Treasurer's Workshop	TBA
Jan 27, 2007	Guest Speaker	TBA
Feb. 24, 2007	Portfolio Management	TBA
Mar. 24, 2007	SSG/Mutual Funds	TBA
	All Day Session with Guest Instructor	
April 28, 2007	Youth Program	TBA
Sept 22, 2007	Annual Meeting	TBA

Lynette Faulkenberry, Director from Bossier City, is conducting a pilot program involving youth from her neighborhood in an educational program about finance and investing. Retired from the Bossier Parish School system after thirty-three years as an elementary teacher and librarian, Lynette lives in Bossier City with her husband Ralph. They have three children and four grandchildren.

The goal of Ark-La-Tex Chapter of NAIC is to see a youth program in your neighborhood. Unfortunately, we don't have enough directors, and need your help. If you are concerned about your children's financial education, please contact Lynette at glfaulk@cox-internet.com and volunteer to start a program in your neighborhood. She can help.

2005-2006 Officers

La Juan Snider Retiring President lajuans@swbell.net	Longview, TX
Nell Perry, V-President nlperry@bellsouth.net	DeRidder, LA
Rose Marie Clarke, Treas. rmcacc@softdisk.com	Shreveport, LA
Millie Laird, Secretary MLAIRD3358@aol.com	Stonewall, LA

Sarah Lockridge, director from **Longview, TX**, conducted several successful stock study sessions in Longview last year. If you have an interest in participating again this year, please contact Sarah at srlock@att.net for details. No advice or recommendations are given. The 'stock to study' from the B I Magazine is the primary stock to be discussed, but other stocks of your choosing will also be considered.

There is no charge for these sessions as long as we can locate a meeting place at no fee.

Want a chapter director to **visit your club**? No charge for a one-time visit during your regular meeting time. Visits usually consist of questions and answers concerning Ark-La-Tex Chapter and/or NAIC.

Does your club need **special instructions** but our regularly scheduled classes don't fit your schedule? Call us. You set the date and time, you select the topic, and we'll send an instructor to your area for a minimum fee of \$150 for up to ten students. Each additional participant over 10, \$10.00 each. You furnish the meeting place, handle the registration, supply refreshments, etc., and an instructor will arrive for a three hour presentation on the subject of your choice. We furnish the instructor, equipment (exception, hands on computer class you furnish computer lab), and handouts. Any of the classes on our schedule are available to you. Need special instructions not on our list? Let us know what you want and we'll try to deliver.

To schedule a class, contact Nell Perry at nlperry@bellsouth.net. To schedule a club visit contact in Shreveport – Bossier area Carolyn Moore at cmoore2@sport.rr.com, Alexandria area Charnia Cheatwood drc@cos-internet.com, Longview area Janet Lee at Janet@cablelynx.com.

Tips for e-mail List

Ark-La-Tex Chapter has its own announcements only e-mail list. You will **not** be inundated with dozens of messages daily, only one or two messages per month about our upcoming classes and other pertinent announcements. If you change your e-mail address and don't notify us, you will be bumped from receiving the reminders.

It's also suggested that you notify your spam blocker to allow delivery. To unsubscribe at any time, simply click on the message at the bottom of the page and send the **blank** e-mail to be removed. Please **DO NOT** hit the "report spam" button instead of unsubscribing. Unless you're careful, that action can have ramifications far beyond what you might ever know about.

What is the Ark-La-Tex Chapter

The BETTER INVESTING ARK-LA-TEX Regional Chapter is the regional, volunteer arm of the National Association of Investors Corporation. Better Investing 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.

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 any board member.

Latest Chapter News

To find the latest chapter news, go to <http://www.betterinvesting.org/chapter/arklatex/events> Postcards are sent for monthly events to club contacts. Do you know who your club contact is? The same information is sent via email to the Chapter Announcements Email List--sign up online <http://www.betterinvesting.org/chapter/arklatex/lists>

ARK-LA-TEX CHAPTER

P. O. Box 6236

SHREVEPORT, LA 71136

