



NATIONAL ASSOCIATION OF INVESTORS CORPORATION

BETTER INVESTING[™]

The Leader In Investment Education

Chapter News and Events

Southeast Florida Chapter

Fall 2005

www.naicsefl.org

Toll Free 877-219-2480

Better Investing Plans for 2005-2006

BetterInvesting is a community of like-minded people committed to becoming better, more informed investors. What we previously called the National Association of Investors Corporation has adopted BetterInvesting as its brand and corporate identity and we are now the Southeast Florida Chapter of the BI organization. The name may sound different but the goal is the same, to help you become a successful investor by offering education and an opportunity to meet other investors with similar interests.

We continue to offer our primary monthly program **CASA (Computer Aided Stock Analysis)** that focuses on evaluation of the data used in the SSG (Stock Selection Guide) and interpreting the results. This analysis is helpful to non-computer users as well as those who are using Toolkit software to prepare SSGs.

The presenter for this series is **Irving Roth**, our

own local Toolkit expert. He structures his presentation series to introduce concepts to beginners while offering veteran investors new ideas and techniques. **Irving** has conducted Toolkit workshops and seminars nationally and we are very fortunate to have him in our chapter.

Other workshops will provide information on mutual funds, club accounting, and Portfolio Evaluation and Review Techniques (PERT). Our popular Club Portfolio Competition will be conducted again this year.

You can obtain more information at our website **www.naicsefl.org** as well as details on how to subscribe to our listserv so you will receive e-mail announcements of new programs and/or changes to scheduled programs. If you have questions, call us (toll free) at 877-219-2480 and leave a message. Your call will be returned shortly thereafter.



2006 Club Portfolio Competition Announced

One of the things that sets our chapter apart from others around the nation is our Club Portfolio Competition (CPC). Southeast Florida club members have an opportunity to get some professional feedback on their club's investment decisions along with suggestions on how to make their club more successful. Portfolios submitted in this competition will be judged on how well they are structured for future success based on projected earnings growth, value, diversification, past earnings growth, and price appreciation.

Philip J. Keating, CFA, Honorary Chairman of BetterInvesting's National Computer Group Advisory Board, Chairman of the Southeast Florida Chapter's BI Board of Advisors, and a professional portfolio manager, will review and judge each portfolio using objective data sources and according to the principles of good portfolio management.

Prizes will be awarded to first and second place

winners in the categories of large, medium, and small clubs. First place prizes will be \$100 per club; second place will be \$50. Winning clubs will be recognized at our BetterInvesting Education Fair and Annual Meeting on April 29, 2006.

All portfolios will be reviewed and critiqued at our Club Portfolio Competition Seminar on Saturday, March 4, 2006, at the Jim Ward Community Center in Plantation, Florida. The extensive presentation handout will include the holdings of all submitted portfolios and additional data about their stocks. The entry fee of \$30 per club entitles the club to send one representative to the review and analysis seminar for free and to receive the handout and critique.

To help clubs prepare and to increase their chances of winning the competition, **Phil Keating** will conduct a Club Portfolio Competition Checkup Seminar in October.

(**Club Portfolio Competition**, *Cont'd on pg. 2*)

Training on Demand - Instruction at Your Convenience

If the scheduled programs offered this year do not meet your needs, you can have our instructors teach classes at your convenience and location. If your organization is just starting an investment club, you can arrange to have one of the chapter directors speak to your group about the BetterInvesting concepts and how you can start a successful club. The presentation is also available in Spanish and there is no charge for this service.

Most of the programs on this year's list can be scheduled at your location. Practically any topic of BI interest can be covered. Cost could be as low as \$20 per person with a \$300 minimum required. If your location will support additional attendees, we will help you fill the class with other clubs or individuals who want to do the same. All you need is a location suitable for groups of 15 or more, and a desire for more knowledge. Contact **Bill Rance** at billr@naicsefl.org or call toll-free 877-219-2480 (leave message) for more information on this program.

Available Classes Scheduled at Your Location

- **Computerized SSG Class - Click by Click**
- **Basic Principles for New Investors**
- **Stock Selection Guide (SSG)**
- **College 100 Series**
- **Take Stock**
- **Club Accounting**
- **Hands on SSG (using Investors Toolkit)**
- **and, ... Much More**



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BETTER INVESTING CAMPAIGN

Learn the Concepts Behind the BetterInvesting Method of Investing
See How They Can Be Put into Action by Clubs or Individual Investors
Scheduled on Demand • Available in English and Spanish • Offered Free

CALL TOLL FREE • 877-219-2480

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Director Nominations and Benefits

Are you or is someone in your club a good candidate for Director on the SEFL Chapter Board?

Directors attend monthly Chapter meetings held the 2nd Wednesday of the month and take part in planning and assisting with classes and our BetterInvesting Education Fair. Individuals should be familiar with the BI principles and willing to learn.

If you would like to serve or nominate someone else, contact **Sherri Perry** at Sherri@naicsefl.org.

Benefits of Being a Director

- Opportunity to learn new skills in publicity, public speaking, teaching, event organizing, and more.
- Getting to know and work with a great group of dedicated volunteers.
- Knowing that you are helping educate other willing investors.
- Complimentary subscription to Online Premium Service and the Mutual Fund Education Center on the BetterInvesting.org website.
- Discounted registration for the Better-Investing National Convention.

Club Portfolio Competition

(Cont'd from pg. 1)

This session will give clubs time to modify their portfolios prior to the competition. The Checkup is designed to instill good portfolio practices and encourage participation in the competition. Clubs interested in the portfolio competition should attend this seminar being offered in Plantation on Saturday, October 15, 2005 (see education schedule).

This competition is for you if you belong to a new club or if your club would just like to have its portfolio reviewed by an expert. The professional guidance received may put your club's portfolio on the right track for greater gains and a *shot* at the prizes. If your club is interested in submitting its portfolio, check our chapter website at www.naicsefl.org for a Competition Entry Form. Entries will be accepted beginning January 1, 2006 and must be postmarked or received online by **February 4, 2006**. If you require additional assistance, call our toll free number **877-219-2480** and indicate your intention to participate in the competition. We will contact you with detailed instructions.

2005–2006 Education Schedule

CASA – SERIES (MONTHLY IN BROWARD COUNTY)

These presentations will review BetterInvesting Magazine's current *Stock to Study*. A Stock Selection Guide (SSG) will be completed using Toolkit software. Cost: \$40 Annual or \$10 at door.

Plantation Community Center

Coordinator/Presenter: Irving Roth

E-mail: iroth@bellsouth.net

Saturday, Monthly, October – April

October 1, 2005, November 12, 2005,

December 10, 2005, January 14, 2006,

February 18, 2006, March 11, 2006, April 8, 2006

Time: 9:30 am – 12 noon

CLUB PORTFOLIO COMPETITION (CPC)

CPC CHECKUP SEMINAR

Tips on positive moves to prepare your club portfolio for entry into the chapter competition. Focus is on how to improve your portfolio. Includes large handout.

Jim Ward Community Center

Presenter: Philip J. Keating, CFA

Saturday, October 15, 2005

Time: 9:30 am – 12:30 pm. Cost: \$20

CLUB PORTFOLIO COMPETITION REGISTRATION

Portfolios from area clubs are submitted for evaluation, recognition, and suggestions for improvement. Prizes awarded to winning clubs.

Online or Mail (Deadline February 4th)

January 1 – February 4, 2006 (Postmarked or Received Online)

Cost: \$30 – Includes one free club admission to the review seminar on March 4, 2006.

CLUB PORTFOLIO COMPETITION SEMINAR

Results of judging and evaluation of all portfolios submitted in the competition. Clubs share ideas. Handouts include information on all club portfolios and all the stocks owned.

Jim Ward Community Center

Presenter: Philip J. Keating, CFA

Saturday, March 4, 2006

Time: 9:30 am – 12:30 pm. Cost: \$20

BI CLUB ACCOUNTING WORKSHOP

Covers basics of accounting and tax preparation using club accounting software. Online software also reviewed.

Plantation Community Center

Presenter: TBA

Saturday, February 4, 2006

Time: 9:30 am – 12 noon Cost: \$20

BETTER INVESTING FOR RETIREMENT

Whether you're preparing for a future retirement or you are already in retirement, this workshop is for you. Suggested personal and financial steps from an expert.

Jim Ward Community Center

Presenter: Philip J. Keating, CFA

Saturday, January 21, 2006

Time: 9:30 am – 12:30 pm. Cost: \$20

PERT WORKSHOP

Portfolio Evaluation and Review Techniques explained by experts. Learn about this valuable tool for maintaining a healthy portfolio.

Plantation Community Center

Presenters: Irving Roth/Lewis Adrian

E-mail: iroth@bellsouth.net

Saturday, March 18, 2006

Time: 9:30 am – 12 noon Cost: \$20

MUTUAL FUND RESOURCE WORKSHOP

Reviews basic concepts of mutual funds. Demonstrates use of BetterInvesting Online Mutual Fund Resources.

Plantation Community Center

Coordinator/Presenter: Marie Seibel

E-mail: seibelmarie@hotmail.com

Saturday, April 1, 2006

Time: 9:30 am – 12 noon Cost: \$20

BETTER INVESTING EDUCATION FAIR (OUR ANNUAL MEETING)

Guest speakers, breakout sessions covering many investing topics, a corporate presentation, and lunch.

Deicke Auditorium, 5701 Cypress Road, Plantation, FL

Saturday, April 29, 2006

Time: 9:00 am – 3:30 pm

Advance Registration Cost: \$45 Individual; \$40 each in
Groups of 3 or more; At the Door: \$50

VOLUNTEER OPPORTUNITIES

Volunteers are the lifeblood of this organization. Learn more about operations and meet the people who make it work.

Attend the monthly directors' meetings.

BetterInvesting SEFL Chapter Directors' Meeting

Jim Ward Community Center

President: Sherri Perry

E-mail: Sherri@naicsefl.org

2nd Wednesday of the Month, September – April

Time: 6:30 pm – 8:30 pm. Cost: Free



Classes Are Centrally Located off Broward Blvd

Jim Ward Community Ctr. Plantation Community Ctr.

301 NW 46 Avenue

5555 Palm Tree Road

Plantation, FL 33317

Plantation, FL 33317

**To Register, Go to www.naicsefl.org/registration
or Call Toll Free 877-219-2480**

**BetterInvesting/NAIC
Southeast Florida Chapter**

**NAIC-SEFC c/o CEG
205 So. Hampton Drive
Jupiter, FL 33458**

**WE ARE ON THE WEB
<http://www.NAICSEFL.org>**

DATED MATERIAL

**NON-PROFIT ORG.
U.S. POSTAGE
PAID
West Palm Beach, FL
Permit No. 590**

Portfolio Checkup Seminar

October 15, 2005 • 9:30 am



Annual Portfolio Review and Analysis Seminar

March 4, 2006
9:30 am

Jim Ward Community Center
301 NW 46 Ave • Plantation, FL

**Club Portfolios Submitted to the
Portfolio Competition will be Reviewed and
Critiqued by Philip J. Keating, CFA**

Cost is \$20 Per Attendee.
Entry Fee of \$30 Entitles Club to
Send One Representative to the
Review and Analysis Seminar for Free.

INVESTOR EDUCATION FAIR

BetterInvesting Education Fair and Annual Meeting

**April 29, 2006
9:00 am – 3:30 pm**

**Deicke Auditorium
5701 Cypress Road
Plantation, FL 33317**

***Guest Speakers
Breakout Sessions
Corporate Presentation
Morning Coffee
Lunch & Door Prizes***

Advance Registration • \$45 Individual
\$40 each in Groups of 3 or more
At the Door • \$50

*Plan now to make this a major event
for your entire club*

**Toll Free 877-219-2480
www.naicsefl.org**