



CAPITOL INVESTOR NEWS

Fall 2003

From Your President

For more than **40 years**, the DC Regional Chapter has offered support to NAIC Investment Clubs and Individual Investors in the Washington Metropolitan area as volunteers, willing and able to show you how to implement NAIC Investment philosophy and principles. There is no substitute for being an educated investor. To that end, DC Regional Directors are dedicated and committed to sharing our knowledge and expertise so that you are better equipped to evaluate companies and understand the stock market.

The Education Committee has initiated a new program called "**Stock to Study**". Join other NAIC investors for an analysis of the **Stock to Study** featured in the **Better Investing** magazine that month. Meets the third Tuesday of the month at the Thomas Jefferson Public Library, Falls Church, VA. There is no charge.

Also important to the chapter is the Club Relations Committee. It's chairperson, Sheilah Christian, hopes in this coming year to assist you and your group in either the formation or operation of an Investment Club. We will help you overcome problems, as well as, share the NAIC philosophy and principles of investing with you. Contact Sheilah at 202-387-1950, option 4 or clubrelations@naicdc.org. Our plan is to conduct workshops in various locations on "**How to Start An Investment Club**" and what has to be done to maintain a club. Let us know if you can provide a location

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Presenting Your New Officers

Following our Annual Chapter Meeting on May 17th, the Board of Directors met to elect new officers for the 2003-04 year. Your new officers are:

- President** Benay Glymph
- Vice President** Kathryn Reddie
- Secretary** Larry Wiener
- Treasurer** Donald E. Lucas

The members of the Executive Committee for the coming year are:

- Director of Club Relations** Sheilah Christian
- Director of Computer Services** Susan Tanoe
- Director of Education** Jo Murphy
- Director of Public Relations**.. I.Clements/K. Reddie
- Director of Recruitment**..... K. Gillogly & C. Yee
- Investor Forum Chair** B. Glymph/A. Uno
- President's Advisor** Anne Uno

Each director's e-mail address is located on our web site at www.naicdc.org. Please feel free to e-mail the director whose job relates to your question. You may also leave a voice message at our chapter phone line, 202-387-1950. ☎

Saturday, September 6 Pre-register for Fall 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 fall classes. We are again offering a \$5.00 savings on the cost of each ½-day, 1-day, or 2-day course. Special Presentation 10:30 to 11:45 am: **The Suddenly Series** from Compufest 2003. Find out about phases in your life when **Suddenly** things happen. Presented by Anne Uno. Additional information available online at www.naicdc.org. ☎

Fall 2003 Education Program Schedule

(150) Annual Reports

Sept. 13, 9:30pm—12:30pm Instructor: Lucas
Background: None. Determine what is important in a report. What are ProForma statements? Off balance items? Recurring and non-recurring items? Misleading revenue tactics? For the beginner.

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

(100) Basic Investment Concepts

Sept. 13, 1:30am—4:30pm Instructors:
 Christian/Tanoe
Background: None. The power of investing; risk vs. reward; 4 principles of NAIC-styled investing; recognize quality companies using the Stock Check List. (Pre-requisite for the 2-day SSG class.)

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

(175) Mutual Fund Investing the NAIC Way

Sept. 27, 9:30am—4:30pm Instructor: Harris
Background: None. Introduction to mutual fund investing the NAIC way. Learn to improve your return using NAIC approved methods and forms.

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

(200) Manual SSG—2 Saturdays

Oct. 4 & Oct. 11; 9:30am—4:30pm Instructors:
 Gillogly/Moreno
Background: 100. For beginning investors. Covers NAIC's fundamental analysis tool—SSG--how to prepare and use it to improve your investing skills.

Univ. of Phoenix, Rockville, Room 104
 (2 day class. Cost \$80.)

(210) Using Toolkit 4.0 Basic

Oct. 18, 1.30pm—4.30pm Instructors: Wiener/Lucas
Background: 200. Learn how to use the key features of Toolkit 4.x to complete a stock analysis. Focus is on SSG features.

GMU, Arlington, Room 245 (1/2 day class, Cost \$35.)

(110) Value Line and NAIC Applications

Oct. 25, 9:30am—12:30pm Instructor: Murphy
Background: None. 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.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(211) Using Toolkit 4.0—Advanced

Oct. 25, 1:30pm—4:30pm Instructor: Goodhart
Background: 210. The use of advanced techniques in the Toolkit 4.x software, including portfolio management tools and undocumented keyboard shortcuts.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(100) Basic Investment Concepts

Nov. 8, 9:30am—12:30pm Instructors: Refour/Williams
Background: None. The power of investing; risk vs. reward; 4 principles of NAIC-styled investing; Recognize quality companies using the Stock Check List. (Pre-requisite for the 2-day SSG class.)

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(115) Finding Stocks to Study

Nov. 8, 1:30pm—4:30pm. Instructors: Gillogly/
 Moreno/Murphy
Background: None. Learn to use the latest in NAIC investing tools: find the best NAIC-styled stock screens; hidden gems of the NAIC magazine & website; how to use the Online Premium Service (OPS); how to use S&P Reports; & much more.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(310) Cash Flow as an Investment Tool

Nov. 15, 1:30pm—4:30pm. Instructor: Lucas
Background 200. Examine a Cash Flow Statement and its three sources of funding. Learn how it can be used as an additional investment tool.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(300) Improving Judgment on the SSG

Nov. 22, 9:30am—12:30pm Instructor: Refour
Background: 200. Improve your analytical skills on the five key judgments of the SSG: estimate future sales & EPS growth, high & low P/Es, future high and low price.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

(215) NAIC Classic Software

Nov. 22, 1:30am—4:30pm Instructors: Gillogly/Moreno
Background: 200 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.

GMU, Arlington, Room 245 (1/2 day class. \$35.)

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George Mason University Professional Center, 3401 N. Fairfax Drive, Arlington, VA, adjacent to the Virginia Square/GMU Metro Station. Free parking on Saturdays. Please call the Center at 703-993-8140 for directions or get a map of the location from the web at:

<http://coyote.gmu.edu/map/arling.html>

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

Fall 2003 Education Program continued

NEW OFFERING: All-Day Portfolio Management: Take both classes for \$50!

(350) Weeding and Feeding Your Portfolio
Dec. 6, 9:30am—12:30pm

Instructor: **Douglas Gerlach**

Background: 300 and either 210 or 215. Understand the key features of PERT. Focus is on using the PERT Report and Worksheet A & B and the Portfolio Management Guide (PMG). Demos in either Toolkit or Classic.

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

(351) Who Let the Dogs In? (And When To Sell)
Dec. 6, 1:30pm—4:30pm

Instructor: **Douglas Gerlach**

Background: 350. How did those "good" SSGs become such "bad" investments? Learn when to sell. Bring in your portfolio (on a disc please!) and we will apply NAIC concepts of portfolio management learned in the morning class.


Univ. of Phoenix, Rockville, Room104
(1/2 day class. \$35.)

President's letter continued

To serve you better, we are conducting an **Online Member Survey** during the entire month of September. Make sure your voice is heard. Live link September 1st to 30th at our revamped Web site, www.naicdc.org.

Directors Cookie Yee and Kevin Gillogly are working to bring more volunteers into the "fold". Chairperson, Cookie states that the objective of the recruitment committee is to promote, retain, and develop programs to encourage volunteers to join and share the NAIC experience. Planned activities include coordinating monthly "socials" for Fall 2003 classes, keeping volunteers informed of upcoming events and developing incentive programs for new volunteers. Potential volunteers should contact training@naicdc.org.

Finding solutions to a secure financial future is of primary concern to many people. In the past couple of years, we have had many challenges. Governance and corporate scandals have further complicated the uncertain stock market. The tried and true usual sources of corporate financial information are suspect. What is a thoughtful person to do? Become an informed and educated investor. Our methods work. And don't forget to mark your calendar for the **Investors Forum 2004**, April 24, 2004, Ernst Community Center, NVCC, Annandale, VA.

Benay Glymph, President 

University of Phoenix, 9601 Blackwell Rd, Suite 100, Rockville, MD 20850. From I-495 (Beltway), take I-270 West to Exit 8, Shady Grove Rd. Left onto Shady Grove, go approximately .7 miles, turn right onto Blackwell (one block after Key West Blvd./3rd light). Free parking.



D.C. Regional Chapter Course Registration Form - Fall, 2003

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. Please make check payable to: **DC Regional Chapter-NAIC** and mail with form to: **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 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 program

Analyze a company the NAIC way with other NAIC investors. Sharpen your skills. Come out the third Tuesday of the month, Sept., Oct., and Nov., 7:30 to 8:30 p.m. Analysis of the **Stock to Study** featured in the **Better Investing** magazine for that month. Bring a completed **SSG**, or pickup one for \$2 at the door. Thomas Jefferson Public Library, 7415 Arlington Blvd, Falls Church, VA. From I-495, take Rte 50 East, on right before the second traffic light. Do you know of a potential site in MD for Spring 2004? \$

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. \$

Latest Chapter News

The DC Regional Chapter Web page has been completely revamped. See the new look and find the latest chapter news at www.naicdc.org. Postcards are sent on a monthly basis 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 at www.naicdc.org, in the Chapter Email Lists section. Twice a year, **Capitol Investor News** is mailed to all members of the DC Regional Chapter and is available online as a PDF file. \$

Online Membership Survey

September 1st thru September 30th participate in our **Online Membership Survey** at www.naicdc.org. Help the chapter respond to your needs and interests.

What programs would you like to see? What topics do you want covered? Suggest chapter improvements.

If you are without Internet access, ask a friend for help or visit your local library. If you belong to a club, make it a club project. \$



TIME DATED MATERIAL

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