

Pacific Rim Investment Club

New Member Information and Charter

New Member Introductory Period

- Attend 4 business meetings and 3 portfolio review meetings
- No investments during this period

Club Objectives and Procedures

Fiscal Objective - Achieve a return on investment (ROI) of 15% or better.

Club Goals – Learn about investing, make money, have fun (in no particular order)

Fiscal & Legal Responsibilities (upon completion of introductory period)

- Read and sign Partnership Agreement (spouses also if they wish to vote) - *Required*
- Read Operating Procedures- *Required*
- Monthly club investments (direct deposit)
- Join and maintain annual BI membership subscription (club manages) - *Note: Spouses are automatic members using the same username & password*
- Purchase ICLUB Toolkit or subscribe to BI online tools including data feed subscription

Operational Responsibilities

- Attend most business meetings each year (continued engagement)
- Attend portfolio review meetings as your schedule permits (continued engagement)
- Review all PMC recommended buys & sells monthly (update your SSGs)
- Present 1 stock/year for potential buy or sell
- Host 1 business meeting/year
- Attend annual club retreat at Fort Worden (Nov) - *optional but highly recommended*

Education

Objectives (Better Investing Methodology - www.betterinvesting.org)

- Read, understand, and critically evaluate an SSG
- Read, understand and critically evaluate PERT and Trend reports
- Read, understand and critically evaluate a Portfolio Review report
- Read & understand partnership monthly valuation statement

Educational Tools & Resources

- Strongly Recommended Within the 1st Year
 - Online BI SSG Classes: (1) SSG Introduction, (2) Adding Judgment (free)
 - Puget Sound Chapter Core Classes (Fall & Spring): (1) BI Methodology, (2) SSG Judgment, (3) Portfolio Management (available online or in person)
- Additional Resources & Educational Events (not mandatory)
 - *Take Stock* by Ellis Traub
 - Puget Sound Chapter Investment Education Conference (Nov)
 - Puget Sound Chapter Investment Cruise (Sep 2016)
 - BI National Investors Education Conference (May)
 - InvestED Conference (Jun)