

## Yankee Chapter Model Club Agenda Saturday, February 13, 2021 - 11AM EST

Club Introduction and Announcements - Brent

Educational Segment - Preferred Procedure - Liz

Club Secretary Report - Sriram

Review and approve past meeting minutes  
 Record current meeting minutes

Treasurer Report - Jack

Update on current club financial information and brokerage account  
 Review current account/portfolio to date totals

Stock to Study - First Savings Financial Group (FSFG) by Brent

Update and Review of Stocks in Portfolio

Brent FLT, TSCO  
 Steve VISA, GOOG, DHI  
 Ira REGN, GNTX  
 Jack DG, SFM, ESNT  
 Liz ULTA, MIDD  
 Sriram INS, MLR

Watch List Update - Jack

Five Below (FIVE)  
 Veeva (VEEV) added 2/8/20

Club Member Voting Process:

Vote on investment of current club funds  
 Vote on any changes to current portfolio holdings

Old Business:

Remaining open items from club financial audit

New Business:

Bivio account renewal  
 Tax form status

Assignments:	Mar	Apr	May	Jun	Jul
Stock to Study	Cheryn Watkins?	Steve	Liz	New candidate?	Ira
Education segment	Sriram	Brent	Steve	Jack	Liz

Adjournment of Club Meeting



Upcoming meetings, all via GoToWebinar at 11:00 AM, Eastern:

Saturday, March 13, 2021

Saturday, April 10, 2021

Saturday, May 8, 2021

Saturday, June 12, 2021