



Information Sheet for Prospective Members ~~Becoming a Member of the~~

Formatted: Highlight

Yankee Chapter Model Investment Club

DRAFT 10/20/2020

If you have decided you want to join our club, here are the steps you need to complete.

- Due to tax laws, we don't accept members from these states:
GA, IN, MO, NJ, NY, OR, PA, WV
- Have an SSN or TIN.
- Become a member of [Better Investing](#).
- Register for upcoming meetings, if you haven't already. Go to <https://www.betterinvesting.org/chapters/online/local-events> and look for "Yankee Model Stock Investing Club"
- Attend 3 meetings of the club.
- Have access to Value Line reports through:
 - [Fairfax County Public Library](#) (Fairfax, VA) has non-resident library cards for \$27/year. Value Line can be accessed online.
 - Other access:
 - Many city and university libraries have physical copies of Value Line available (e.g., the Boston Public Library), and some allow online access (Amherst, MA library does but not the BPL).
 - Subscriptions to Value Line range from about \$200-\$600 annually.
- You will be scheduled to present a stock selection guide (SSG) to the club on a company of your choice. A mentor will help you if needed. Having access to one of the following programs is also required: SSGCore, SSG+ (through Better Investing) or Toolkit6 (from [iClubCentral](#)).
- Current members must vote to accept you into the club.
- If you want to invest less than \$200 monthly in the club, current members must agree.
- Having read all the documents in the [New Member Packet](#), sign the Partnership Agreement (the Operating Procedures are included in the Partnership agreement by reference).
- Arrange for direct deposit of your monthly investment to our broker.