

## **BI BRIGHTON MODEL INVESTMENT CLUB**

### **New Members – What you can expect:**

**To become a member, you must first attend 3 meetings, and then express your interest in joining the club. The membership then votes (we've never turned anyone away) to accept the new member.**

### **Financial**

- Monthly payment to club portfolio - a **minimum** of \$25 per month
- Membership - Better Investing (BI): Annually \$41 per year (should be prorated depending on when you join); Club Basic Membership + data service is \$90/yr
- SSGs – You will need some method of generating an SSG (our method of evaluating stocks)
  - Toolkit 6 – currently \$189 (one time charge for software) plus data service from BI **OR**
  - BI – Core Upgrade @ \$90/yr (includes your membership) – includes CoreSSG, Data Service and other benefits **OR**
  - Plus Upgrade @ \$110/yr (includes your membership) – includes CoreSSG, SSGPlus, Data Service and more
- You will pay your share of club expenses which will be deducted from your personal club holdings – examples: Club membership to BI, subscription for Manifest Investing, postage and office supplies, and usually a gift to ReMax.
- You will also have your share of the capital gains/losses from stock we've sold during the year. This form (K-1) will be generated when the Treasurer does the club taxes. This is usually in March. You can't file your income taxes without this K-1 form.

### **Participation**

You are expected to:

- **LEARN!!!!**
- Read and understand Partnership Agreement and Operating Guidelines
- Attend meetings regularly – either with Go to Meeting – or in person.
- Participate in Industry Studies (1-2 per year)
- Participate in presenting Educational Presentations (probably 1 per year)
- Participate in presenting new Stock Ideas to the club (maybe 1 -2 per year)
- Be a Stockwatcher for 1-2 stocks: You'll work with someone else and keep track of your particular stocks. You'll need to report on your stock once a year after their year end including SSG to evaluate that stock.

2/8/2016