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| Date & Time | Tuesday Mar 16 2021 0700-0900PM |
| Location | Online ONLY via GoTo Meeting |
| Online Information | https://global.gotomeeting.com/join/251997157  You can also dial in using your phone.  United States: +1 (312) 757-3121  Access Code: 251-997-157 |

Agenda

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| 07:00-07:05 PM | Welcome Partners, Regular Guests and First Time Visitors  Call to Order | Patricia Onufrak |
| 07:05-07:10 PM | Club renewal is still in progress (1 yr vs 3 yrs?) Need an Asst Treasurer: Jo willing, if no one else. | Gladys  Sheryl |
| 07:10-07:15 PM | Secretary’s Report   * Approval of February Minutes (posted in Bivio) | Maskey |
| 07:15-07:40 PM | Education: MorningStar Newsletter: The Hare and Tortoise | Jo Murphy |
| 07:40-08:00 PM | New Stock Presentation   * Company: Simpson Manufacturing Co. (SSD)   (Next Month: Jonathan) | Maskey |
| 08:00-08:45 PM | Stock Reports  ABBV – Amy  Alimentation Couche-Tard  BRK- B- Gladys  CBOE – Arvind  Essent – Jo,  Gentex – Wilbert  LGIH – Paul Monster – Kent NVEE – Sheryl | Stock Watchers  Amy  Pat  Gladys  Arvind  Jo Wilbert Paul Kent Sheryl |
| 08:45-08:50 PM | Treasurer’s Report | Kent Billmyer |
| 08:50-09:00 PM | Decision: Buys and Sells | Partners |
| 09:00-09:05 PM | Member Questions about Investing in General: Send question to Amy ([amy@tegwyn.com](mailto:amy@tegwyn.com)) | Experts will Answer |
| 09:05-09:15 PM | Upcoming Events and Announcements (***see below***) | Patricia Onufrak |
| 09:15 PM | Adjourn | Patricia Onufrak |

BI and Community Events & Announcements

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| March 2021 | BI Membership Renewal are DUE for 2021 |
| Wed Mar 17 2021  07:00 PM-09:00 PM  (3rd Wednesdays) | **Montgomery County Model Investment Club (MCMC) Monthly Meeting**  Visitors are Welcome. Free Event: Online via GoTo Meeting  More information at: <https://www.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-maryland-nov> |
| Sat Mar 20 2021  09:30 AM-11:30 | **AAII Webinar: Growth Investing and Super-Performance Stocks,** by Ross Haber, co-founder TraderLion.com (Technical Analysis): register @ AAIIDCMetro.com |
| Sat Mar 20 2021  09:30 AM-03:30 PM | **Basics of the SSG and Beyond – Session 1**  Learn the basic concepts of long-term investing. Understand the Better Investing’s fundamental analysis tool: The Stock Selection Guide (SSG). Get comfortable with the beginner level online tools.  Cost Details:  $30 for both days  $20 for one day |
| Sat Mar 27 2021  09:30 AM-03:30 PM | **Basics of the SSG and Beyond – Session 2**  Review of Day One. Find stocks to study. Learn about objective investment research sources. Develop sound judgments. Practice completing several SSGs both as a group and on your own. Learn how to share stocks with the others.  Cost Details:  $30 for both days  $20 for one day |
| Mon Apr 1 2021  07:00 PM – 08:00 PM | **DMV Chapters presents: Digging into the BI Magazine March 2021**  Join the DC Regional Chapter along with the Maryland Chapter of  BetterInvesting for free webinar where we examine the featured stocks from  the most recent issue of the BI Magazine. This event is designed for both  beginners and those looking to improve their judgment on the SSG. In a little  over an hour, we will have four stock presentations using the current issue of  BI Magazine or using the features from the BI website.  Registration URL: <https://attendee.gotowebinar.com/register/5871174801973864716>  Webinar ID: 375-845-547 |
| Tue Apr 13 2021  07:30PM-09:00PM  (2nd Tuesdays) | Money Matters (Book Club)  April Title: **Your Complete Guide to a Successful and Secure Retirement** by Larry Swedroe and Kevin Grogan. 2019.  One stop resource for those preparing for retirement. Chapter 8 through the end.  Covers spend-down strategies, Social Security, Medicare, annuities, insurance, estate planning and related retirement issues not covered in the 1st half of the book. |
| Tue Apr 20 2021  07:00PM–09:00 PM  (3rd Tuesdays) | MicNOVA Model Investment Club (MicNOVA) Monthly Meeting. Visitors are welcome. Free Event: Online via GoTo Meeting. More information at: <https://www.betterinvesting.org/chapters/dc-regional/local-events/model-stock-investment-club-meeting-nova-dec> |
| 90 Days to Try SSG Free | Better Investing offers Non-Members to try SSG Plus/Core SSG for FREE.  Check out: <https://www.betterinvesting.org/find-great-stocks/online-tools> |
| BINC 2021  10/21/2021-10/24/2021 | BetterInvesting National Convention  The Westin Dallas Park Central  Texas |

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|  | Name | New Stock Presentation | Conduct MicNova Monthly Meeting | Conduct MicNova Planning Meeting |
| 1 | Patterson, Shervl | 4/20/2021 | 11/16/2021 | 11/11/2021 |
| 2 | Billmver, Kent | ~~11/17/2020~~ | ~~12/15/2020~~ | ~~12/10/2020~~ |
| 3 | Hughes, James A.(Ty) | ~~1/19/2021~~ | 10/19/2021 | 10/14/2021 |
| 4 | Krishnarao, Maskev, Sec. | 11/16/2021 | 5/18/2021 | 5/13/2021 |
| 5 | Krishna, Arvind K | 10/20/2020 | 8/17/2021 | 8/12/2021 |
| 6 | Arumugam, Baskar | 2/16/2021 | 10/20/2020 | 10/15/2020 |
| 7 | Henrikson, Gladys | 3/16/2021 | 09/21/2021 | 09/16/2021 |
| 8 | Murphy, Josephine C (Jo) | 12/15/2020 | ~~1/19/21~~ | ~~1/14/2021~~ |
| 9 | Emmons, Elinor (Kathy) | 9/15/2020 | 2/16/2021 | 2/11/2021 |
| 10 | Laing, Amy Gay | 5/8/2021 | 4/20/2021 | 4/15/2021 |
| 11 | Nixon, Wilbert | 6/15/2021 | 7/20/2021 | 7/15/2021 |
| 12 | Onufrak, Patricia | 7/20/2021 | 3/16/2021 | 3/11/2021 |
| 13 | O’Mara, W. Paul | 8/17/2021 | 11/17/2020 | 11/12/2020 |
| 14 | Timmes, Jonathan | 9/21/2021 | 6/15/2021 | 6/10/2021 |

Schedule: New Stock Presentation, Planning and Monthly Meeting Chair

Last Month This Month Next Month

Schedule: Education

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|  | Title | Presenter | Date |
| ~~1~~ | ~~How to present 5-min stock report(Ticker Talk Webinar Ken K)~~ | ~~Sheryl/Ken K Video~~ | ~~10/20/2020~~ |
| ~~2~~ | ~~How to invest in ETFs – such as in the gaming programs, like NERD~~ | ~~Linda Hunt~~ | ~~11/17/2020~~ |
| ~~3~~ | ~~Stock screening in the BI SSG (Part 1 of 2)~~ | ~~Baskar~~ | ~~12/15/2020~~ |
| 4 | ~~How to use cash flow vs P/E to determine investability in a new/young company~~ | ~~Gladys & Carol~~ | ~~1/19/2021~~ |
| 5 | ~~Other good sources for finding good stock ideas: Ticker Talk, Stock-up, Manifest, VL, MS, Barrons, Invest Adv Svc, WSJ, Other Newsletters (Part 2 of 2)~~ | ~~Jo Murphy~~ | ~~2/16/2021~~ |
| 6 | MorningStar Newsletter: The Hare and Tortoise | Jo Murphy | 3/16/2021 |
| 7 | Basics of using Stock (price) charts to see if/when stock is in Buy Zone (with cheat sheets for 50/200 day Moving avg & RSI, other ratios | Ty/Wilbert | 3/16/2021 |
| 8 | How to do “Preferred Procedure” in SSG | Kathy | 4/20/2021 |
| 9 | PERT Charts from the SSG/SSG Plus | Sheryl | 5/18/2021 |
| 10 | One page Quick Analysis of a Stock | Baskar | 6/15/2021 |
| 11 | Basic Analysis of stocks using Charts | Jonathan | 7/20/2021 |
| 12 |  |  | 8/24/2021 |
| 13 | Exploring the "Research" Tab in SSG | Arvind | 9/21/2021 |
| 14 | Different types of orders you can place with your broker (Limit, Market, Trailing, Stop Loss) | Amy | 10/19/2021 |
| 15 |  |  | 11/16/2021 |
| 16 |  |  | 12/21/2021 |
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|  | How to calculate a Signature P/E (Bonnie Biafort Book) | Linda |  |
|  | Alternative approaches to constructing & managing a portfolio: style, industry; performance to S&P 500 |  |  |
|  | Introducing Detailed Estimates in SSG Plus (1 of 2) ; Add Analyst Estimates to Your SSGs : Ticker Talk July 2020 |  |  |
|  | "Research and Your SSG" , 2nd of 2 "Adding Judgement" programs (Stock-up Sept 10 2020- Ken Kavula/Ann Cuneaz). Gt tips for what to  look for in Value Line, Morningstar, CFRA, Company reports and more. |  |  |
|  | New Tools/Capabilities in the SSG. |  |  |
|  | Addressing anomalies in Stock & Market performance |  |  |
|  | Putting together Powerpoint Presentation (For new stock presentation) - What should the presentation answer?, snipping tool, Strawman outline - maybe a Sat morning |  |  |
|  | Understanding /Applying various financial terms: "Book Value," "Cash Flow," Current Ratio, Quick Ratio, Peg Ratio |  |  |
|  | Stock Screening BI Weekly Emails |  |  |
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