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| Date & Time | Tuesday November 9 2021 0700-0900PM |
| Location | Online via GoTo Meeting and from Tysons Pimmit Library |
| Online Information | https://global.gotomeeting.com/join/251997157You can also dial in using your phone.United States: +1 (312) 757-3121Access Code: 251-997-157 |

Agenda

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| 07:00-07:05 PM | Welcome Partners, Regular Guests and First Time VisitorsCall to Order | Sheryl Patterson |
| 07:05-07:10 PM | Update on Jonathan Timmes Withdrawal Valuation & Payment | Gladys |
| 07:10-07:15 PM | Should we buy Fidelity Bond (~$80/yr) for MicNova? – Need 2 volunteers to look at Bivio Club Café discussions and return with recommendation in Dec. | Sheryl |
| 07:15-07:20 PM | Sign-up/schedule for 2022: Education and New Stock Presentations (see minutes from October 2021 and titles *(members to provide)* | Sheryl |
| 07:20-7:35 PM | Education- 1: Basics of using Stock (price) charts to see if/when stock is in Buy Zone (with cheat sheets for 50/200 day moving averages, RSI, and other ratios) | Wilbert |
| 07:35-07:50 PM | Education – 2: MicNova Portfolio Review | Ty |
| 07:50-08:05 PM | New Stock Presentation: TBD | Maskey |
| 08:05-08:20 PM | Stock Reports (*end of Oct earnings reports*)ADBE-Kathy Gentex - Paul Microsoft – Gladys *CBOE- Maskey- next month**T Rowe Price - Kathy – next month**Facebook – Wilbert* –*next month* | KathyPaulGladys  |
| 08:20-08:25 PM | Treasurer’s Report | Gladys |
| 08:25-08:40 PM | Decision: Buys and Sells | Partners |
| 08:40 -08:50 PM | Upcoming Events and Announcements (***see below***) | Sheryl |
| 08:50 PM | Adjourn |  |

BI and Community Events & Announcements

Please sign up on the Google Calendar for up-to-date and more upcoming events in the BI DC Chapter and community.
[https://calendar.google.com/calendar/embed?src=335rgm[2m,6gdcb67lnqtherb8%40group.calendar.google.com&ctz=America%2FNew\_York](https://calendar.google.com/calendar/embed?src=335rgm%5b2m,6gdcb67lnqtherb8%40group.calendar.google.com&ctz=America%2FNew_York)



Schedule: New Stock Presentation, Planning and Monthly Meeting Chair

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| 1 | Patterson, Sheryl | 6/14/2022 | 11/9/2021 | 11/4/2021 |
| 2 | Hughes, James (Ty) | 1/11/2022 | 10/12/2021 | 10/7/2021 |
| 3 | Krishnarao, Maskey | 11/9/2021 | 5/10/2022 | 5/5/2022 |
| 4 | Krishna, Arvind | 10/12/2021 | 8/9/2022 | 8/4/2022 |
| 5 | Arumugam, Baskar | 2/8/2022 | 10/11/2022 | 10/6/2022 |
| 6 | Henrikson, Gladys | 3/8/2022 | 2/8/2022 | 2/3/2022 |
| 7 | Murphy, Josephine (Jo) | 12/14/2021 | 1/11/2022  | 1/6/2022 |
| 8 | Emmons, Elinor (Kathy) | 10/11/2022 | 9/13/2022  | 9/8/2022 |
| 9 | Laing, Amy | 5/10/2022 | 4/12/2022 | 4/7/2022 |
| 10 | Nixon, Wilbert | 9/13/2022 | 7/12/2022 | 7/7/2022 |
| 11 | Onufrak, Patricia | 7/12/2022 | 3/8/2022  | 3/3/2022 |
| 12 | O’Mara, W. Paul | 8/9/2022 | 11/8/2022 | 11/3/2022 |
| 13 | Timmes, Jonathan | 4/12/2022 | 6/14/2022 | 6/9/2022 |

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Last Month This Month Next Month

Schedule: Education Topics/ Dates – to be updated by members

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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~~ |
| 7 | How to do “Preferred Procedure” in SSG | Kathy | 4/20/2021 |
| 8 | PERT Charts from the SSG/SSG Plus | Sheryl | 5/18/2021 |
| 9 | One page Quick Analysis of a Stock | Baskar | 6/15/2021 |
| 10 | How to navigate and use Yahoo Finance as a source for stock ideas and analysis. |  |  |
| 11 | Ratios using Price | Gladys/Sheryl | 8/24/2021 |
| 12 | Exploring the "Research" Tab in SSG | Arvind | 9/21/2021 |
| 13 | Different types of orders you can place with your broker (Limit, Market, Trailing, Stop Loss) | Amy | 10/19/2021 |
| 14 | 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 | 11/16/2021 |
| 15 |  |  | 12/21/2021 |
|  |  |  |  |
|  |  |  |  |
|  | 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 tolook 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 |  |  |
|  |  |  |  |