

A Message from our Chapter President:

BetterInvesting's headquarters defines chapters' function as **"providing local support and education through a nationwide network of local chapters. Chapters are brought to life by more than 1,500 experienced member volunteers. Think of them as mentors—ready to stand by your side to help you get the most from your BetterInvesting membership. These committed volunteers can play a vital role in your development as an informed, confident and capable investor."**

Whether we are assisting an individual looking for a better way to invest or a club looking to bring their group up to date on the latest tools, the bottom line is to educate in an atmosphere that is free from a sales pitch.

The shrinking number of volunteers in our chapter has meant that we have had to plan better with fewer resources. Webinar and Go-To-Meeting software allow us to provide online education and permit members far from our meeting place to follow along. We also plan to use Go-To-Meeting to visit clubs, especially those out of our immediate region, during one of their scheduled meetings. We continue to offer monthly investment book discussions and are encouraged by the number of regular and new visitors to our long term Virginia Model Investment Club as well as our newer Montgomery County Model Investment Club.

But the need for new chapter members shortens our reach into the community. The chapter needs instructors to offer online and live courses. We need volunteers to start up and maintain social media that reach younger investors. We need ideas for promoting our events and meeting the needs of clubs. If you are reading this letter, then you are a member of this chapter. Join us!

Sheryl Patterson

**AAII/BI Joint Program:
 April 21**

Two Leading Indicators That Predict Recessions and the Stock Market Crash that Follows is the title of Nick Atkeson's talk. The lengthened bull market leads many to wonder when it will come to an end. Nick will show us how to reliably identify in advance an elevated risk for a sustained bear market, and how to situate one's portfolio. Also, in bull markets, indicators like relative strength momentum can be used to invest in the strongest sectors of the market. Nick Atkeson is a founding partner of Delta Investment Management and has co-authored the book *Win by Not Losing*. To register, go to www.aaiddcmetro.com See page 2.



**Annual DC Chapter Meeting:
 May 5**

Daniel Lee is a senior counsel for the SEC Office of Investor Education and Advocacy and will present the ins and outs of using EDGAR. EDGAR is the Electronic Data Gathering, Analysis and Retrieval database maintained by the U.S. Securities and Exchange Commission that is used to house the required filings of publically traded companies. Mr. Lee will provide practical information and tips for using the website that will help you to research companies that you already invest in or might want to invest in the future. See page 3.



Montgomery County Model Investment Club (MCMC)

The DC Chapter is proud to announce a new model club located in Montgomery County. The club known as Montgomery County Model Investment Club (MCMC) follows BetterInvesting principles and best practices of the organization. This is the second Model Club sponsored by the DC Chapter. The other Model Club is in Northern Virginia Club and is commonly known as MicNOVA. We have 7 members in MCMC and all meetings are free and open to the public. We meet on the 3rd Wednesday of the month at the Rockville Memorial Library, 21 Maryland Ave, Rockville, 20850. (See page 2 & 3 for dates and times). There is free parking (up to 2 hours) with validation at the library. Drop by for a visit and network with other like minded long term investors and become a Better Investor.

Information about Webinars

Stay connected to investors across the country and to volunteers in the local chapter of BetterInvesting—from the comfort of your home. There are many classes and stock studies offered. See calendar p. 2 & 3.

How do I sign up? Permit us to send you notices. Update your BI Profile to check *Receive Chapter News and Events*. BI members will receive an automatic email invite to register. Non-members need to send a request to Gladys Henriksen (gladys.henrikson@verizon.net) to be included on BetterInvesting's DC Chapter guest list. When the invitation is received, click on "register" and fill out the online form.

What equipment do I need? Webinars are "listen only" so if you have speakers with your computer you need no additional equipment.



Every week, members from across the country contribute new stock studies. Visit the First Cut collection of completed Stock Selection Guides (SSG) to look for new investment ideas: www.betterinvesting.org/Members/Tools/First+Cut/default.htm

SPRING 2018 EDUCATION PROGRAM CALENDAR

Jan. 9 Money Matters Book Discussion 7–8:30pm
Fundamental Analysis for Dummies, by Matt Krantz. Parts 3-5.
 Oakton Library, Fairfax Free. All welcome

Jan. 10: Model Investment Club (MicNOVA) 7–9pm
 Tysons-Pimmit Library, Falls Church Free. Visitors welcome

Jan. 17: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library, Rockville Free. All welcome

Feb 5: Chapter Webinar 8:30–9:30pm
 Linda Hunt analyzes an industry for an investible stock
 Register at: www.betterinvesting.org/dcregional \$10 fee waived

Feb. 13: Money Matters Book Discussion 7–9pm
Smart Women Love Money: Five Life-Changing Rules of Investing, by Alice Finn. Oakton Library Free. All welcome

Feb. 14: Model Investment Club (MicNOVA) 7–9pm
 Online meeting only this month Free. All welcome

Feb. 21: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

Mar. 13: Money Matters Book Discussion 7–9pm
Warren Buffett's Ground Rules, by Jeremy Miller.
 Oakton Library Free. All welcome

Mar. 14: Model Investment Club (MicNOVA) 7–9pm
 Tysons-Pimmit Library Free. Visitors welcome

Mar. 17: (1) Stock Selection Method of Choice (SSG) 9–4pm
 Instructor: TBD
 In depth understanding of the structure and method of BetterInvesting's fundamental analysis tool.
 UVA Virginia Center Cost: \$50* see note

Mar. 21: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

Mar. 24: (2) Software to Improve Stock Picks. 9–12noon
 Do the SSG using the Online Tools. Instructors: TBD
 Bring your laptop. UVA Virginia Center \$30* see note

Mar. 24: (3) Improve Your Analysis Skills 1–4 pm
 Instructors: Garrish & Gilogly
 Practice forming good estimates on the 5 judgment points of the SSG. UVA Virginia Center \$30* see note

Note: For Mar. 17 & 24 classes: \$80 total for both days & all three sections, or can pick & choose individual sections at prices indicated.

Apr. 3: Money Matters Book Discussion 7–9pm
The Upstarts: How Uber, Airbnb, and the Killer Companies of the New Silicon Valley Are Changing the World, by Brad Stone.
 Oakton Library Free. All welcome

Apr. 9: Chapter Webinar 8:30–9:30pm
 Ty Hughes discusses Index, mutual funds & ETFs in portfolio building. Register at: www.betterinvesting.org/dcregional
 \$10 fee waived

Apr. 11: Model Investment Club (MicNOVA) 7–9pm
 Online Meeting this month only. Free. Visitors welcome

Apr. 14: Club Anniversary Day 10:30am–12:30pm
 Celebrate with clubs having anniversaries of 5, 10, 15, 20 or more years. Good time to network and to learn what holds successful clubs together and makes them profitable.
 Rockville Memorial Library Free. All welcome

Apr. 18: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

Apr. 21: Joint AAIL/ BetterInvesting Event 9:30am–12noon
Two Leading Indicators That Predict Recessions and the Stock Market Crash that Follows by Nick Atkeson from Delta Management. Northern Virginia Community College, Annandale Campus. Register at aaiddcmetro.com
 \$35 (before Apr. 11; \$40 after; \$45 at door)

Contact Info for BetterInvesting Washington DC Regional Chapter

Title	Name	Phone	Email
President	Sheryl Patterson	(703) 314-7384	srp14@gmail.com
Virginia Model Investment Club	Gladys Henrikson	(703) 346-5758	gladys.henrikson@verizon.net
Montgomery County Model Investment Club	Joy Garrish	(301) 656-9159	joygrr@gmail.com
Club Support.....	Kathy Emmons	(703) 915-2299	kathy@emmonsgroup.com
Classes	Jo Murphy	(703) 532-9107	josephinemurphy@gmail.com
Membership and address changes	BetterInvesting	(877) 275-6242	service@betterinvesting.org

SPRING 2018 EDUCATION PROGRAM CALENDAR

April 28: "Investment Clubs: What, Why, & How to Start"
 Presented by Chapter Directors 10:30am–12:30pm
 Arlington Central Library. Free. Bring a friend

May 5: Annual DC Chapter Meeting 10:30am–12:30noon
 Program and Business Meeting. Daniel Lee from SEC to explain
 the revised and more friendly Edgar website
 Arlington Central Library Free. All welcome

May 8: Money Matters Book Discussion 7–9pm
The New Rules of Retirement, by Robert Carlson.
 Oakton Library Free. All welcome

May 9: Model Investment Club (MicNOVA) 7–9pm
 Tysons-Pimmit Library Free. Visitors welcome

May 16: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

May 17- 20 BINC National Convention Orlando Florida

June 4: Chapter Webinar 8:30–9:30pm
 Ken Williams and others talk stocks.
 Register at: www.betterinvesting.org/dcregional \$10 fee waived

June 12: Money Matters Book Discussion 7–8:30pm
*Get IT Together; Organize Your Records So Your Family Won't
 Have to*, by Melanie Cullen. Oakton Library Free. All welcome

June 13: Model Investment Club (MicNOVA) 7–9pm
 Tyson-Pimmit Library Free. Visitors welcome

June 20: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

July 10: Money Matters Book Discussion. 7–8:30pm
Blockchain Revolution by Don Tapscott
 Oakton Library Free. All welcome

July 11: Model Investment Club (MicNOVA) 7–9pm
 Tysons-Pimmit Library Free. Visitors welcome

July 18: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

Aug. 7: Money Matters Book Discussion 7–8:30pm
The Industries of the Future by Alec Ross
 Oakton Library Free. All welcome

Aug. 8: Model Investment Club (MicNOVA) 7–9pm
 Tysons-Pimmit Library Free. Visitors welcome

Aug. 15: Montgomery County Model Club (MCMC) 7–9pm
 Rockville Memorial Library Free. All welcome

Class/Event Locations:

Arlington County Public Library, 1015 North Quincy Street, Arlington, VA 22201

Northern Virginia Community College, Annandale Campus. 8333 Little River Turnpike, Annandale, VA 22003. For map, go to www.nvcc.edu/annandale/maps.html

Oakton Public Library, 10304 Lynnhaven Pl., Oakton, VA 22124 (Located near Oakton Shopping Center, Hunter Mill and Route 123). For map go to www.fairfaxcounty.gov/library/branches/ok

Rockville Memorial Library, 21 Maryland Avenue, Rockville, MD 20850. Park in Garage B for validated parking in Rockville Town Square garage. For map, go to www.montgomerycountymd.gov/library/branches/rockville.html

Tysons-Pimmit Library, 7584 Leesburg Pike, Falls Church, VA 22043. For map go to www.fairfaxcounty.gov/library/branches/ty/

UVA Northern Virginia Center, 7054 Haycock Road, Falls Church, VA 22043. (Located near the West Falls Church Metro Station)

Detailed Directions and Maps Online:

www.betterinvesting.org/dcregional

Register Online with a Credit Card:

www.eventbrite.com keyword BetterInvesting. You may also register online at www.betterinvesting.org/dcregional

Pay by Check:

Use the registration form on page 4 and mail with your check

Model Investment Club of Northern Virginia (MicNOVA) 7–9pm

Meets monthly on the 2nd Wednesday

Montgomery County Model Investment Club (MCMC) 7–9pm

Meets monthly on the 3rd Wednesday

Visitors are invited to attend monthly meetings to explore ideas for their investment clubs or to learn about starting an investment club. Come early and talk informally with others. MicNOVA was established jointly by our local chapter and the Fairfax County Public Library in order to encourage clubs—new and established. The mission is investment education. The club website (www.micnova.net) has information about upcoming meetings and the stocks and educational subjects being presented.

Calling all Marylanders! Come visit our newly formed club. (see p. 1 article.) Get ideas for strengthening your own investment group or just come and talk stocks with us. Meet other BetterInvestors. Our new Model club is here to help you become educated investors. Check us out. Visitors welcomed at all meetings.

Money Matters Financial Discussion Group: 7–8:30pm

**Meets monthly on the 2nd Tuesday
 at the Fairfax County Public Library, Oakton Branch**

This informal group shares information about financial matters, learning from other participants and usually focusing on pre-selected books available through the library. The group voted for titles for the coming year (see the calendar). It is not necessary to have read the books but as with most things, you will benefit more if you have. A leader usually provides an overview of the book under discussion.

The beginning of the meeting is devoted to questions, sharing and the latest economic news. Topics range from personal finance to investing. The group is open to anyone interested in expanding their knowledge of the financial world.

Support for Clubs

Directors in the DC Chapter have been using GoToMeeting that allows participants to discuss various investment topics. Clubs that would like to set up a session with one of the directors can contact Sheryl Patterson at www.srap14@gmail.com. Topics could range from club operations to issues related to stock studies. Club members decide.

Learn Online at BetterInvesting

Regular webinars and classes are offered on the website (www.betterinvesting.org). You can hear nation-wide experts on all facets of investing—a great way to learn at your own pace. Unable to take the class or webinar on the date it is offered? Members have access to the recorded sessions. Join us online! Check us out also on Youtube (www.youtube.com/betterinvesting)

The Nation's Largest Non-Profit Organization Dedicated to Successful Investing

Since 1951, BetterInvesting's publications and educational resources have enabled millions of everyday people from all walks of life to take control of their own investments and make more informed financial decisions. Click on www.betterinvesting.org for information about their Open House invitation to guests.

BetterInvesting™ DC Regional Chapter Course Registration Form — Spring 2018

Please submit one form per class at least one week before class begins, 2-day online registration deadline. No credit or refunds for missed classes. Request transfer to another course two weeks prior to course date from the Director of Education, education@naicdc.org. Please make check payable to: **DC Regional Chapter–NAIC** and mail with form to: BetterInvesting™ Course Registrar, 2004 Barnwood Terrace, Vienna, VA 22181.

Tuition: **\$30** per ½-day class **\$50** per all-day class **\$80** per 2-day class

Course name: _____ Course date: _____

Your name: _____

Address: _____

City: _____ State: _____ ZIP _____

E-mail address: _____ Use only in reference to this class.

Phone number: _____ Amount enclosed: _____