

Monthly Investment Club Task Grid  
 For the Meeting on: \_\_\_\_\_

| Item  | Person | Comments |
|---|--------|----------|
| Send Meeting Notice via email or zoom                     |        |          |
| Post Meeting Notice on FB                                 |        |          |
| Email Meeting Minutes and Upload on Myclub                |        |          |
| Coordinate Preparation Refreshments for the Meeting       |        |          |
| Arrange 2 <sup>nd</sup> hour Presentation                 |        |          |
| Collect investment dues at the meeting                    |        |          |
| Preside at the meeting                                    |        |          |
| Take minutes at the meeting                               |        |          |
| Take attendance at the meeting                            |        |          |
| Assign stock presenter for upcoming meetings              |        |          |
| Who's presenting the enrichment article for this meeting? |        |          |
| Assign future stock and enrichment presentations          |        |          |
| Record investment payments and upload data onto iClub     |        |          |
| Deposit new investment funds into savings account         |        |          |
| Execute buy / sell orders as the club has approved        |        |          |
| Follow up social media posts                              |        |          |
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