



Investment Club Meeting Agenda

Date _____

(The treasurer and assistant treasurer should collect investment dues from members prior to the beginning of the meeting so that the new funds can be included in the treasurer's report)

Call to Order – President

Roll Call – Secretary (Record Attendance)

Review Minutes – Secretary

Treasurer's Report – Treasurer

Review Investment Club Portfolio – Vice President

- Each stock in the portfolio should have an assigned member monitoring it

New Stock Ideas / Presentations

- Vice President should pre-assign members to PREPARE to present a stock to study/consider
 - Presenter should have copies of the value line for the stock being presented
 - Presenter should present the Stock Selection Guide (SSG)
- It's a good idea to also pre-assign someone to present an article from Better Investing or some other Magazine or Website Source

Discussion

- The Presider over the discussion should get a sense if there's consensus interest in one or more buy or sell recommendations.

Action

- Entertain Motions to buy or sell stocks (consider one stock action at a time).

Entrepreneur's Corner

- Preassign an entrepreneur to present their business

Old Business

New Business

Announcements and Updates

- Always announce relevant Better Investing programs and updates

Adjourn

Note: The second Hour of the Club should be devoted to a pre-planned special presentation on a topic relevant to stock investing