

Tips, Tricks, & Techniques

The Investment Club Contact

The Space Coast Chapter considers your Investment Club's contact person to be perhaps your most important member of your group.

Has your club designated one? The Space Coast Chapter and BetterInvesting periodically mail or email information of interest to the designated club contact of record. The club president is responsible for providing the club contact information (name, mailing address) to BetterInvesting Headquarters. Please forward the club contacts information directly to BetterInvesting at: P.O. Box 220, Royal Oak, MI 48068

This will enable the BetterInvesting to provide a monthly postcard to the Club Contact with information on Chapter activities. It is the responsibility of the Club Contact to disseminate that information to all club members. For changes to the club contact information, include the new address, old address, and NAIC member number. PLEASE DO NOT SEND ADDRESS CHANGES TO YOUR LOCAL CHAPTER!!

Many Club Contacts think that everyone in their club must get these notices and training information and, hence, do not pass on the information to other members. Please consider adding a standard agenda item for your meetings - Report by Club Contact.

Club Contact Information from BetterInvesting

What is the role of the "contact person" for the club?

When a club joins BetterInvesting, a contact person is appointed to coordinate communications between the club and us. As the cover letter explains, the club kit is mailed to the club contact person and includes such items as the Official Guide - Introduction to Successful Investing Handbook, Investment Club Operations Handbook, a sample set of stock study forms, and the model club video.

Quarterly, the club contact will receive the condensed Standard & Poor's company reports book. This book is free to our clubs. Annually, the club contact is mailed the Fidelity Bond application and subscription renewal notices. The bonding information generally arrives in October, while two renewal notices are sent before the club's renewal date. The club also has general liability insurance. A copy of the

insurance binder is included in this club kit, and updated copies will be sent with the club renewal notice.

Regional chapters often mail special program notices and information to the club contact. Thus the contact person is an important connection between your investment club and the volunteers. You might want to consider adding "BetterInvesting correspondence" to your club meeting agenda as a reminder to check with your club contact for any new information or program information.

Will a renewal notice be mailed to our club when the year is up?

Two renewal notices will be mailed to the club contact before the club's renewal date. The first renewal is mailed three months before your anniversary, while a second renewal is mailed approximately two months before your anniversary. To enjoy continuous delivery of the monthly magazine, return this renewal before the one-year renewal date printed on the club renewal. A list of the members' names and addresses is printed on the renewal for your convenience. Make any corrections as needed. New members may be added by printing their names and addresses to the list.