

BetterInvesting's™ Online Chapter Monthly Bulletin

August 2025

Volume 5, Issue 8

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Online Chapter Presidents' Committee Message

Dear Better Investing Online Chapter Members

The S&P 500 and Nasdaq continue to notch new record highs, fueled by strong earnings, AI momentum, and resilient consumer demand. It's an exciting time—but also a revealing one. How's your portfolio holding up in this environment? Are you actively investing and uncovering new opportunities? Standing by and smiling at your gains? Or maybe frozen in place, unsure what to do next? Wherever you are, this is a great moment to reflect, recalibrate, and consider what moves might help you stay ahead.

A portfolio contest is the perfect space to unleash ideas that don't fit neatly into BetterInvesting methodology. Without constraints like positive earnings or long-term growth projections,

contestants can explore bold strategies, test speculative picks, and spark fresh conversations around what's possible. It's a chance to shake things up—share perspectives, debate choices, and re-energize as you make selections. And each month, all entrants receive updated standings and portfolio summaries, so you can track progress, compare strategies, and stay engaged throughout the 11-month contest.

My club has found the contest to be a great way to think differently. We've explored speculative ideas, taken chances on pre-earnings companies, and tested strategies we wouldn't normally consider. It's fun, it's competitive, and it keeps us sharp. We've even purchased two stocks selected for our contest for our club portfolio.

In past years, one stock made all the difference. In 2023–24, entrants who held NVIDIA saw their portfolios surge—thanks to a total return of over 170% that year alone. This year, Palantir was the standout: up more than 450%, it helped propel several contestants to the top. The takeaway? A single bold pick can define your portfolio—and your standing.

The Fourth Annual OLC Portfolio Contest kicks off September 1, 2025, and runs through July 31, 2026. It's free to enter, open to individuals and clubs, and designed for one purpose: outperformance. This is your chance to build a portfolio that beats the rest in just 11 months—no constraints, no pressure to follow traditional BetterInvesting guidelines.

To Enter Click [Here](#)

View Contest Rules [Here](#)

Entries are open through **August 31, 2025**.

Submit via the [form](#) or email: **contact@online.betterinvesting.net** with “Portfolio Contest” in the subject line. Let's see what kind of performance you can deliver.

We Value Your Feedback

Please share your thoughts and let us know what you think.

Please share yours at contact@online.betterinvesting.net

Presidents' Committee,

Jie Eagleson, Susanne Koster, Chris McCarron, JoAnne Obata

OLC Annual Meeting and Special Guest Presentation

Mark your calendars for August 11, 2025.

OLC Annual Meeting Starts at 8:00 PM ET and the Special Presentation will be at 8:30 PM ET, by Jackie Cummings Kioski, CFP, AFC, Financial Educator & Consultant; Director, BetterInvesting Board. Mark your calendar for an exciting session.

When: Monday, August 11, 8:00 PM (ET)

Topic: A Money Journey that began with a Club and Continues with a little FIRE.

Presenter: Jackie Koski, CFP, AFC

How: Register for the [Webinar](#) meeting. You will receive a confirmation and a link to join the meeting.

Biography:

Jackie is best known for reaching FIRE (Financial Independence, Retire Early) in her 40s making less than six figures. Her fascinating story has been featured on the Rachael Ray Show, CNBC, MarketWatch and other major media platforms.

Her journey to building wealth and understanding investments began with joining a BI investment club in Cincinnati, Ohio in 2008. She was a club member for over 12 years and served as president and vice president. She joined the OKI Tri-state Chapter board in 2009 and currently serves on the BetterInvesting National Board of Directors. She has been a keynote speaker at BINC and presented at national and chapter BI events.

She's the author of two books: "F.I.R.E. for Dummies" (featured in the May 2024 BI Magazine) and "Money Letters 2 my Daughter". She is co-host of the "Catching Up to FI" podcast that helps late starters on the journey to financial independence. The weekly show has reached over 1 million downloads, putting it in the top 1% of podcasts worldwide.

Jackie holds the Certified Financial Planner® and Accredited Financial Counselor® credentials, and earned her master's degree in financial planning & financial therapy from Kansas State University.

You can learn more about Jackie here: <https://linktr.ee/moneyletters>

Chris McCarron, Membership Training & Education Chair

OLC Mentoring Workshop

Mark your calendars for the September 2025 Open Forum.

September Mentoring Workshop will be on July 16, 2025 (3rd Wednesday) at 8:30 PM ET. Mark your calendar for an exciting session.

When: Wednesday, September 17, 8:30 PM (ET)

Topic: Investing in Strategic and Precious Metals

Presenter: Louis O'Connor

Strategic Metals Invest invite private investors to own the metals that are critical to all nation's economic prosperity and defense capabilities. These rare earth metals have been outperforming precious metals and most major stock indices this century. The first step is education. Join us for an introduction to this exciting new asset class.

How: Register for the [Zoom](#) meeting. You will receive a confirmation and a link to join the meeting.

Contact Chris McCarron, Membership Training & Education Chair if you have any feedback or ideas for future workshops.

Chris McCarron, Membership Training & Education Chair

Call for Presenters

Have you presented an educational topic to your club?

Would you like to share your investment tips or insights?

Have you researched a topic of your interest and are eager to share your findings?

If so, we'd love to hear from you!

Contact [Chris McCarron](#) for more details.

Education Tip of the Month

BetterInvesting keeps a list of all the recent updates to the Online Stock Tools-
<https://www.betterinvesting.org/find-great-stocks/online-tools/updates>.

2025-2026 OLC Portfolio Challenge

September 1, 2025 - July 31, 2026

Now that the 2024-2025 Portfolio Contest is completed (winners will be announced in the Annual Meeting on August 11, 2025), it is time to move on to the exciting contest for the next year.

BetterInvesting's Online Chapter (OLC) is conducting its Fourth Annual Portfolio Contest between September 1, 2025 and July 31, 2026. The Portfolio Contest aspires to draw attention to the BetterInvesting (BI) investing approach, to enhance relationships among club members, to enhance all members' relationship with BetterInvesting and the BI Online chapter, and to have fun.

To Enter Click [Here](#)

The current Rules of Contest, subject to minor changes for 2025-26, can be seen via clicking [here](#). They are designed to structure the contest as a meaningful educational event that reinforces BI's principles and stock analysis tools.

Key features of the Contest are:

- Clubs or individuals can enter, although a member of a club that enters cannot enter as an individual,

- Entrants will have \$100,000 of imaginary money to invest,
- Each entrant must select between four and seven stocks,
- Entrants are being asked, but not required, to provide SSGs and indicate the rationale behind their selection of stocks,
- Once during the year contestants will be able to change holdings in their portfolio,
- During the 2026 OLC Annual or September Meeting spokespersons for the winning portfolios are expected to make a short (5 min.) presentation that covers the rationale for the stocks selected, any portfolio rebalancing, and comments on the portfolio's performance during the contest.

During the registration period ending August 31, 2025 clubs and individuals can enter the contest by completing an [entry form](#) or submitting the necessary information to contact@online.betterinvesting.net with "Portfolio Contest" in the subject line. The current 2024-25 entrants, their portfolios, and their standings can be viewed by clicking on [Portfolio Summary](#) and [Details](#). A similar web site will be created for the 2025-26 contest. Periodic updates on the progress of the Portfolios will be sent to our members via Interspire emails and/or our OLC Monthly News Bulletin.

For other questions or comments or suggestions, please email contact@online.betterinvesting.net with "Portfolio Contest" in the subject line.

Dan Perlman, Portfolio Contest Chair

Membership and Club Visits

Celebrating Milestones and Supporting Growth

We love seeing our clubs thrive—and this month, we're raising a toast to three that have hit major milestones on their BetterInvesting journey:

Dawson Investors Club hit the 60-year milestone! The club commemorated the occasion with a certificate ceremony followed by an educational session on advanced company research techniques.

Snake River Ladies Investment Club rang in 30 years together. The club commemorated the occasion with a certificate ceremony followed by an educational session on How to Find Stocks to Study.

Family Investment Group hit the 25-year milestone! The club commemorated the occasion with a certificate ceremony followed by a Portfolio discussion and Investment Club Best Practices.

These celebrations are not only a testament to each club's longevity, but a reminder of the benefits that come from continued learning, collaboration, and connection.

Club visits—whether educational, operational, or just a casual conversation—are available to all BetterInvesting clubs.

Empower Your Club with Free Expert Support

Looking to sharpen your club's investing skills? We've got you covered—at no cost. Our experienced BetterInvesting volunteers are ready to visit your club (virtually or in-person) and deliver top-notch education tailored to your needs. And here's the kicker: if your entire club holds BetterInvesting memberships, we'll add a **FREE SSG+ subscription** to the mix. That's powerful software, free training, and friendly visit.

Say Hello to “Coffee Chat” Visits

Want something more laid back? Our new Coffee Chat format offers a relaxed way to ask questions, explore ideas, and learn at your own pace. These informal sessions are hosted virtually, making it easier than ever to bring expert insights to your club's screen—without leaving your own home.

Personalized Just for Your Club

No two clubs are alike—and we love that. Whether you're after foundational training, advanced analysis, or fresh ways to spark member engagement, our volunteer-led sessions are built around your goals and interests. Let us know what your club wants to learn, and we'll make it happen.

Let's Connect!

This is your chance to re-energize your club and tap into the tools that make BetterInvesting great. Reach out today to schedule a visit or learn more:

Email us at membership@online.betterinvesting.net

Visit our [Chapter Website](#) for more details.

Volunteers

Interested in volunteering with our chapter?

Not sure how to get started? Training is provided and your contribution can be as large or small as your time permits. Please contact us at membership@online.betterinvesting.net for more information.

For all our current volunteers – THANK YOU! Our Chapter runs on your valuable contribution.

Model Investment Club Meetings

Model Investment Club meetings are sponsored by the BetterInvesting Online Chapter. They are FREE and open to all.

[Yankee Model Stock Investing Club - REGISTER](#)

- Meets the 2nd Saturday of each month
- Next Meeting: Saturday, August 9 at 11:00 AM ET

[International Model Stock Investing Club - REGISTER](#)

- Meets the 3rd Monday of each month except 2nd Monday in December
- Next Meeting: Monday, August 18 at 8:30 PM ET

Recurring “Quick Access Links”

BetterInvesting™ National News

Part of your membership benefits package is enrollment in [BI Weekly](#). Every Thursday, BetterInvesting™ emails all members a bulletin listing national webinar registrations, StockUps, TickerTalks, First Cut Stock Reports, and more. You don't want to miss it!

If you are not receiving your [BI Weekly](#), go to your [BI member profile](#) and update your *Email and Product Subscription Information* selections to let BI know you would like to routinely receive this valuable weekly bulletin.

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