

Congratulation 2025 Certificate Clubs



50 Year Club

AYEM INVESTMENT CLUB



40 Year Clubs

DOW JANES INVESTMENT CLUB

WOMEN INVESTMENT NETWORK INVESTMENT CLUB

Y-KNOTT INV CLUB

30 Year Clubs

JABBERWOCKY CLUB

M CUBED INVESTMENT CLUB

SAN FRANCISCO FOG BANK INV CLUB

STAR PERFORMERS INV CLUB

STOCKMEN'S INVESTMENT CLUB

VALLEY INVEST-HERS

WALL STREET WIZARDS INVESTMENT

10 Year Club

BULLPEN INVESTMENT GROUP

5 Year Clubs

BLACK STREET INV GROUP

POST 19 INVESTMENT CLUB LLC

STOCK IT TO ME



These Clubs were from all over our region:

*Walnut Creek, Livermore, Piedmont, Pleasanton, Martinez, San Rafael,
Napa, Berkeley, Richmond Redwood Valley*



Resources for Members

2025 SF Bay Area Chapter Investor Education Day

SF Chapter Directors

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Content

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www.betterinvesting.org/chapters/san-francisco-bay-area

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San Francisco Bay Area Chapter

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The San Francisco Bay Area Chapter of BetterInvesting welcomes you as a member of BetterInvesting. As a member of BetterInvesting you are automatically a member of your local BI chapter, at no extra cost!

The San Francisco Bay Area Chapter serves San Francisco, Oakland, Walnut Creek, San Mateo, San Rafael, Santa Rosa, Napa, Vallejo, Eureka, Menlo Park, Napa and Pleasanton. We are chartered by the National Board of BetterInvesting and staffed with volunteers, responsible for carrying out the mission of BetterInvesting; to provide investment education for local investors, help them learn the BetterInvesting investment principles and tools as well as assist investment clubs with management and accounting. We accomplish this goal with investment educational seminars, workshops, and club visits. [Click here](#) for more information.

Our Chapter's mission is to educate, mentor and support all investors: individual members, investment club members, and potential investors using BetterInvesting principles. The Chapter offers classes and special events on topics from investment basics to club accounting. You can always find the most current information about our activities by clicking on [Local Events](#).

*SF Directors – 7 Volunteers
Local classes – in-person and virtual
Club visits – let us come visit your club!*



We Recently Lost Three Long Serving Directors

Jacquelyn Harbert (Jackye)

Joanne Willcox

Jim Willcox

Thank You For Your Service

SF Model Club

- Currently 16 members. Though 2 of those members are leaving the Club.
- Wide spectrum of experience and backgrounds among members.
- Meets the second Thursday of every month.
- We meet virtually for all meetings and on occasion in-person.
- Started in 2011.

San Francisco Model Club Portfolio – 9/29/2025

	Shares Held	Cost Basis per Share	Total Cost Basis	Price per Share	Market Value	Unrealized Gain/(Loss)	Percent of Total
Amazon.com Inc (AMZN)	20.0000	210.0000	4,200.00	222.1700	4,443.40	243.40	3.0%
Apple Inc (AAPL)	51.0000	29.4623	1,502.58	254.4300	12,975.94	11,473.36	8.7%
Asml Holding Drc (ASML)	11.0000	752.6136	8,278.75	962.6100	10,588.71	2,309.96	7.1%
Charles Schwab Corp (SCHW)	145.0000	46.3977	6,727.66	96.8900	14,049.05	7,321.39	9.4%
Intuitive Surgical Inc (ISRG)	21.0000	93.5681	1,964.93	439.2200	9,223.62	7,258.69	6.2%
LVMH Moet Hennessy Louis Vuitton (LVMUY)	30.0000	132.3570	3,970.71	122.9900	3,689.70	(281.01)	2.5%
Markel Group Inc (MKL)	7.0000	1,267.3457	8,871.42	1,900.5500	13,303.85	4,432.43	8.9%
Miller Industries Inc (MLR)	157.0000	33.8890	5,320.58	39.6600	6,226.62	906.04	4.2%
Nvidia Corp (NVDA)	40.0000	108.5300	4,341.20	181.8500	7,274.00	2,932.80	4.9%
Paycom Software Inc (PAYC)	24.0000	167.4708	4,019.30	218.1700	5,236.08	1,216.78	3.5%
Ross Stores (ROST)	46.0000	130.8800	6,020.48	151.8600	6,985.56	965.08	4.7%
Ulta Beauty Inc (ULTA)	21.0000	327.9167	6,886.25	553.7100	11,627.91	4,741.66	7.8%
VISA Inc (V)	44.0000	72.1971	3,176.67	340.1600	14,967.03	11,790.36	10.0%
Vertex Pharmaceutical (VRTX)	26.0000	270.3819	7,029.93	395.3100	10,278.06	3,248.13	6.9%
			72,310.46		130,869.53	58,559.07	87.6%

Cash Account	Total Cost Basis	Market Value	Unrealized Gain/(Loss)	Percent of Total
ETrade Securities LLC	18,527.41	18,527.41	0.00	12.4%
	18,527.41	18,527.41	0.00	12.4%
Total Securities and Cash Accounts	90,837.87	149,396.94	58,559.07	100.0%



National Resources

- BetterInvesting Magazine
- Over 100 Investment Education Videos
 - TickerTalk and their bite-sized discussions
 - StockUp webinars on investment topics
- First Cut Stock Reports
- SSG Stock Search Engine Tools
- Many sources of stock ideas
- Highly awarded investment newsletters

National Resources

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Don't have access? Free, limited trial version



First Cut Stock Reports

Every week, BetterInvesting members from across the country share new stock studies.

[VIEW ALL](#)

Most Active Stocks

The top 10 companies our members are investing in (ranked by combined buys and sells) are:

	Buy/Sell
1. NVIDIA (NVDA)	170-72
2. Apple (AAPL)	64-102
3. Amazon.com (AMZN)	97-52
4. Palantir Technologies (PLTR)	113-35



Investment Club Connect

For clubs to find like-minded members who are interested in joining an investment club and vice versa.

[Find a Match →](#)

Club Forum

Investment club operations topics for myICLUB and BetterInvesting members.

[Visit the Forum →](#)

National Video Learning Library

Stock Selection Programs

Video series that explore all aspects of stock selection and the Stock Selection Guide (SSG).



Intro to the SSG



Adding Judgment



Buy the Best



Special Programs

Regularly Scheduled Programs

Regular programs that our members love.



StockUp

TickerTalk

CORE SSG
SSG-PLUS

Investment
Clubs



Membership

Guest
Speaker
Series

First Cut Stock Reports

First Cut Stock Reports are created by BetterInvesting members on good quality companies. These stock reports consist of a completed Stock Selection Guide (SSG) showing the judgments made by the author, and a written report sharing why each judgment was made. Use these reports to find potential investments and to compare your SSG with others from our community of investors.

The First Cut Stock Report template (DOCX) is an easy-to-use form providing a simple format to capture your rationale and thoughts about your completed SSG. Complete instructions to submit a First Cut Stock Report are included in the template.



[DOWNLOAD FIRST CUT STOCK REPORT TEMPLATE](#)

SSGPlus Stock Search Engine Tools

Online Tools

Launch SSG - Enter Ticker Here

Don't have access? Free, limited trial version

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SSGPLUS

Portfolios and Studies

Portfolios

Show 10 entries

Actions

Stock Ideas - Search for a Company

Search Criteria

9 Yr Sales Growth (%):

9 Yr Earnings Growth (%):

5 Yr EPS R-squared:

Size:

Sector:

Dividend Yield (%):

Pre-Tax Profit Trend:

Return on Equity Trend:

Morningstar Growth Grade:

Morningstar Profit. Grade:

Morningstar Financial Health:

PE / Historical EPS Growth:

Traded Exchange:

Predefined Screens

Looking for more in-depth screening? Check out
MyStockProspector.com
MyStockProspector

Filtered List

Ticker Heat Map

Technology

AAPL	MSFT	ADBE	AMD	ANET
		ASML	AVGO	ENPH
		SWKS	CSCO	CRWD
NVDA	FTNT	TSM	PANW	PAYC
		CLFD	QCOM	INTC

Healthcare

RMD	UNH	NVO	CRL	ABBV	VRTX
	ADUS	EW	PFE	DHR	MRK
INMD		CVS	VEEV	ISRG	GMED
	MEDP	LLY	JNJ	ABT	MDT
				ZTS	SYK

A resource of stock ideas based on the top 100 studies created by members in the last 90 days.

Investment Club Connect – New!!!

[Home](#) > [Members](#) > [Investment Clubs](#) > Investment Club Connect

Introducing a New Era of Camaraderie: Investment Club Connect

Investment Club *Connect*

With Investment Club Connect, it's now easier than ever for clubs to find like-minded members who are interested in joining an investment club.

Investment Club Connect is an exciting program designed to help individuals and investment clubs connect seamlessly. Many individuals have expressed a desire to join existing investment clubs, while clubs have struggled to find new members when someone leaves.

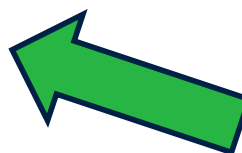
Here's how it works:

1. Individual members express their interest in joining a club, and we maintain a confidential list of these individuals, along with clubs open to adding new members.
2. Our custom matching technology considers factors like gender, distance, and other preferences to present individual member information to existing clubs.
3. Clubs can then decide whether they wish to connect with a prospective new member, and if interested, they can reach out directly.
4. There's no obligation for either party – think of it as investment club dating!
5. Best of all, this service is entirely free for BetterInvesting members!



REGISTER YOUR CLUB WITH INVESTMENT CLUB CONNECT

GET MATCHED WITH A CLUB



Questions? [View the FAQ \(PDF\)](#)

Summary

- There are lots of learning resources and videos for investors.
- Consider Club Connect to find new members.
- See how BI members are investing with both First Cut and the SSGPlus Search Engine.
- Join your volunteer Board and expand your investment knowledge.

Question or Comments?

Or

Time for door prizes.

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Spread the Word

During these uncertain times, everyone could use some financial security. Invite your friends, family, and co-workers to try BetterInvesting free for 90 days.

www.betterinvesting.org/freetrial



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