

Rollin Wagon Investment Club
Member National Assoc. Of Investors Corp (NAIC)

Prospective new member information sheet

1. Club meets monthly on the 4th Tuesday at 7PM at the Englewood Methodist Church at 3885 South Broadway.
2. The partnership is limited to 20 members.
3. To become a partner you must attend 3 meetings and then be voted on by the membership attending the meeting. (A quorum must be present and you must receive 100% yes votes.)
4. As a partner you are expected to be participate at each meeting in the following ways:
 - a. Pay the initiation fee of \$30.00, which will be credited to the partner's capital account.
 - b. Make a monthly investment in the club of a minimum of \$20 but not more than \$100, in \$5 increments, which is credited to the member's account.
 - c. Be an active "stock watcher" for specific stocks that the club owns, reporting on the stocks at least quarterly in the month after it is reviewed in "Value Line".
 - d. Preferred but not required, you need a computer with the BetterInvesting software "Toolkit". A subscription to OPS (Online Premium Service) allows you to import data regarding the stocks to be used in the software "Toolkit". Apx. Cost for the "Toolkit" software is \$160 and the OPS is \$30 per year.
 - e. Serve refreshments at the break during the monthly meeting. Currently this will be about once per year.
 - f. Take classes as deemed necessary by the member himself in stock theory, buying and take other items as offered by the Rocky Mountain Chapter of the BetterInvesting Community.

- g. Be a member of a “stock study group” which meets, generally quarterly and reviews stocks not owned by the membership, to see if it would fit within the Club’s criteria for possible purchase and report this information to the club.
 - h. Sign the “Beneficiary Form” as a way to transfer your investment to you family in the event of medical/health problems.
5. It is recommended that you become a member of the NAIC national group, BetterInvesting. The club is a member and your membership will be thru the club, which saves you \$25 from an individual membership. A benefit of membership is the “BetterInvesting” magazine that comes out monthly and a club membership card.