

## Investment Club Application

Forming an investment club helps multiply the benefits of a BetterInvesting membership. It is an excellent way to stay focused, gain experience and accelerate your financial education as you work together to become more successful investors. Clubs give you wonderful advantages including **education, support, buying power**, and the **comfort and growth potential inherent in a COMMUNITY**. Please return this completed application to get started.

BetterInvesting clubs also have an opportunity to save money on one of their biggest expenses: *brokerage commissions*. Eligible clubs that open a club account at Folio Investing will have the annual account fee for the **Folio Investing Unlimited Plan** waived. *That's a \$290 value*. BetterInvesting dues-paying clubs with four or more paid members are eligible for this cost-saving benefit. For more information about Folio Investing, call Member Services at 877-275-6242, email [service@betterinvesting.org](mailto:service@betterinvesting.org) or visit [www.betterinvesting.org](http://www.betterinvesting.org).

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### Club Dues \$45/Year (required)

#### Benefits of Club Dues include:

- Commission-free, unlimited trades through Folio Investing (\$290 value)
- Official Guide, *Introduction to Successful Investing Handbook* (\$15 value)
- *Investment Club Operations Handbook* (\$15 value)
- Support and education from local chapters
- Standard & Poor's quarterly stock reports
- General liability insurance (\$300 value)
- Optional fidelity bond insurance

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### Membership (required) – \$79 (Full Membership Package) or \$35 (Basic Club Membership)

#### Membership Package = \$79 per year

##### *Your Best Ticket to Prosperity — Strong Clubs Produce Strong Earnings!*

Active, educated members increase a club's earning potential. The full BetterInvesting Membership Package provides online tools and resources that enable each member to master the BetterInvesting method of selecting quality stocks and mutual funds. Features of membership include:

- Online Stock Selection Guide and Stock Comparison Guide
- Online Mutual Fund Check List, Comparison Guide, Trend Report and Screening Tool
- Online Getting Started Curriculum — classes on how to buy stocks and mutual funds
- Industry-leading stock and mutual fund data feeds encompassing over 6,000 stocks and 20,000 mutual funds and ETFs
- Monthly *BetterInvesting Magazine* (print and digital formats)
- Access to the information-rich "member-only" website, including:
  - Online Stock Study Series (live, interactive online webinars)
  - First Cut (completed reports on stock candidates for your consideration)
  - *BetterInvesting Magazine* archives (an expansive library of education articles)
- Monthly BetterInvesting newsletters
- Access to \$52/year Barron's subscription (\$339 value)
- Access to national, regional and local events
- Discounts on investing tools, resources, partner newsletters, and selected retailers
- Preferred rates on money markets, credit cards, and certificates of deposit

#### BetterInvesting Basic Club Membership = \$35/year

- Monthly *BetterInvesting Magazine* (print and digital formats)
- Access to "member-only" website
- Monthly BetterInvesting newsletters
- Access to Barron's subscription
- Access to national, regional and local events
- Discounts on investing tools, resources, partner newsletters, and selected retailers
- Preferred rates on money markets, credit cards, and certificates of deposit

Also, whatever membership you choose, you will have full access (through online forums, discussion groups, events, and other communication channels) to the collective wisdom of the financially savvy BetterInvesting community!

**Club Annual Cost: \$45 club dues + \$79 or \$35 each member**

## Investment Club Application

Complete and return this application. We'll send you everything you need to set up and operate your club. Club dues and membership fee should be included with application. If you have any questions, please contact Member Services at 877-275-6242 or at [service@betterinvesting.org](mailto:service@betterinvesting.org).

**CLUB NAME** \_\_\_\_\_  
**CONTACT PERSON** \_\_\_\_\_  
**ADDRESS** \_\_\_\_\_  
**CITY** \_\_\_\_\_ **STATE** \_\_\_\_\_ **ZIP** \_\_\_\_\_  
**PHONE NUMBER** \_\_\_\_\_ **EMAIL** \_\_\_\_\_

**BetterInvesting Membership**  
(required)  
**\$79 Full Membership Package**  
(includes online tools)  
**OR**  
**\$35.00 Basic Club Membership**

Complete information for each club member below – attach additional sheet if needed

	Name	Address		
1.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
	Phone _____	Email _____		
2.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
3.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
4.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
5.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
6.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
7.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35
8.	_____	_____	<input type="checkbox"/> \$ 79	<input type="checkbox"/> \$ 35

Check enclosed made payable to BetterInvesting

AmEx    Discover    MasterCard    Visa

Credit Card \_\_\_\_\_ Exp. Date \_\_\_\_\_  
 Security Code # (3 digit # found on back of your credit card) \_\_\_\_\_  
 Name of Credit Card Holder \_\_\_\_\_

**Membership Totals**    \$ \_\_\_\_\_

**Club Dues**            + \$ **45**

**Grand Total**         = \$ \_\_\_\_\_

[Mail or fax completed form with your payment to BetterInvesting](#)

**Mail:** BetterInvesting, PO Box 220, Royal Oak, Michigan 48068

**Fax:** 248-583-4880