

INVESTMENT CLUB MEMBERSHIP APPLICATION

NAME _____ Soc. Sec.# _____

ADDRESS _____

Ph: Home _____ Work _____ E-Mail _____

Contact/Emergency _____

NAIC Investment Clubs are created primarily to learn about stocks and the stock market. Since member dues are small, you will probably not “get rich” as a member. However, you will learn about stocks you may wish to include in your own investments. Your commitment and interest in learning how to evaluate stocks and your willingness to devote time and the energy necessary for your education is essential to the development and growth of yourself and the club.

Membership in the Dollars & Sense Investment Club will require enthusiasm and commitment and active participation on your part. We will accept and vote on your application at the third meeting/training session you attend.

Each member is expected to:

- Read and agree upon the Investment Club Policies as outlined in the Partnership Agreement, and sign the Partnership Agreement.
- Study the NAIC Official Guide, with the club absorbing the cost of that guide.
- Attend meetings regularly and participate in club activities.
- Research and study various stocks with the time spent being approximately 3-4 hours monthly.
- Subscribe to the NAIC philosophy of owning stock for the long run, i.e. 3-5 years.
- At your first meeting as a member, you will pay an initiation fee of \$50.00 and our minimum monthly investment of \$50.00. Both of these fees will purchase units for you. If you wish, you may invest more monthly than the minimum monthly investment.
- The club encourages you to join NAIC each year. Joining entitles you to a subscription to Better Investing Magazine and discounts on various NAIC software, classes and literature.
- Learn how to & prepare an SSG (Stock Study Guide), the basic NAIC tool used in analyzing stocks.
- Follow a particular stock and report on it monthly, with an annual in depth study following the company’s annual financial statement.
- Attend training sessions presented by the local NAIC Chapter.

If you subscribe to the above, we welcome you as a dedicated member of our club.

Signature: _____ Date: _____