



How To Mentor

Suggested guidelines for GenXchange members who are mentoring new members.

Prior to guest's first meeting:

- Define an Investment club
- Describe GenXchange's philosophy
- Explain the NAIC and its role in our club
- Explain the monthly tasks of each member/officer.
 - Review prior Meeting Notes and Agendas
 - Explain member responsibilities and assignments
 - Explain expected time frames for completion of tasks

Prior to guest's second meeting

- Answer any questions that arose at the first meeting
- Explain membership contributions/evaluation units
- Review Mission Statement, By-laws, Partnership Agreement

Prior guest's third meeting

- Familiarize guest with the Value Line and Annual Reports information.
- Assist guest in stock presentation preparation.

Guest can apply for membership to GenXchange Investment Club after 3 out of 4 consecutive meetings

After first new member meeting

- Answer any questions that arose at the meeting
- Review what each member will be doing during the next month
- Review the fee structures and regulations
- Have new member read chapters 1, 2 & 6 of the "Starting and Running a Profitable Investment Club" book
- Go over a Value Line report – have new member complete the Value Line Workbook.
- Have new member assist in completion of member's assignments for the month. (i.e. Stock Selection Guide)
- Teach new member electronic forms of club communication – i.e. Yahoo Groups & NAIC I-CLUB.

After second new member meeting

- New member should read chapter 7 of the "Starting and Running a Profitable Investment Club" book
- Teach new member the Stock Check List.
- Have new member complete a SCL on a company of their choice
- Begin having new member select an industry
- Have new member assist in completion of member's assignments for the month. (i.e. Stock Selection Guide)

After third new member meeting

- New member should read chapters 8, 9 & 10 of the "Starting and Running a Profitable Investment Club" book
- Begin teaching the Stock Selection Guide (by hand).
- Have new member assist in completion of member's assignments for the month. (i.e. Stock Selection Guide)
- New member can check out the Beginning SSG binder from the club library
- Continue mentoring and teaching new member throughout the year