



Public Relations Overview

3 Traits of Good Clubs

- ❖ Enjoyable Social Activity
- ❖ Ensure all members are committed to club's philosophy
- ❖ Ensure all members are active

Where to Find People

- ❖ Work, church, neighbors, friends, family
- ❖ NAIC Meetings
- ❖ Other Investment Seminars

Note: Invite all interested members even if they don't initially want to join. A productive meeting can motivate others to join.

Why Guest Speakers Are Important

- ❖ Critique of Portfolio & Procedures
- ❖ Teach Topics or Class
- ❖ Present Securities

Where to Find Guest Speakers

- ❖ Schools, universities (Economists, Accountant/Finance, Business Departments)
- ❖ Banks, brokers, accountants, work
- ❖ NAIC & other clubs
- ❖ Company's Investor Relations Departments

Keeping Interest High

- ❖ Participate in NAIC Annual Performance Survey
- ❖ Field Trips – local companies, stock exchange, library, annual meeting
- ❖ Parties (investment theme optional), banquets, picnics, events with sister club(s)
- ❖ Planned purely social meetings (collect money, and receive statements only)
- ❖ Annual retreat (verification & yearly planning)
- ❖ Contests, incentives, awards
- ❖ Investor's Fairs and NAIC sponsored events
- ❖ Educational Programs, book reports, Reports from Appendix D
- ❖ Club annual report/prospective
- ❖ Donate one month's investment to charity, party, or trip (rent a boat or banquet hall)
- ❖ Sell tickets to a private dinner party, have door prizes, 50/50 pot (company party)
- ❖ Give survey from BI 2/00 – Good member Test
- ❖ Workshops on personal portfolios, debt management, savings & emergency funds, insurance

Guidelines for Success

- ❖ Follow structured yet flexible agenda
- ❖ Set short-term & long-term goals, track progress
- ❖ Require participation from all
- ❖ Reward participation
- ❖ Support continuing education

- ❖ Maintain stock study approach & management procedures
- ❖ Be creative, meet the needs of the club
- ❖ Encourage NAIC program participation
- ❖ Promote spirit, enthusiasm, excitement, and enjoyment
- ❖ Use Visual Aides