

PROPOSED TOPICS FOR PB IG 2024 MEETINGS – subject to confirmations

Mar 05: NOTE DATE CHANGE: A review and discussion of Rob McClelland's ten considerations for improving odds for successful investing 9:30 – 10:30;
Investment selection; goal setting, things to look for, what to expect, managing the unexpected. Sources of information. 10:30 – 11:30.

May 14: Tracy Fleischmann MBA, J.D. will be speaking about Wills and Estate Planning 9:30 – 10:30 – thanks Glenn Weir.

Wayne Eaves speaking about the benefits of dividend growth investments, how to find them and how to manage them. 10:30 – 11:30

Jun 11: Investment Advisors – What do we want? What do we expect? How do we determine their worth? Paid or “free”? One or several?

Jul 9: A presentation by a fee-for-service Investment Advisor (IG member to arrange)

Aug 13: A presentation by a commission paid stock broker/advisor (IG member to arrange)

Sep 10: A better approach to Canadian Stock selection and management (see article – BUILDING A BETTER CANADIAN STOCK PORTFOLIO)

Oct 8: What can go wrong? Re momentum strategy – discussion....

Nov 12: ETF's – The good, the bad and the ugly - discussion

Dec 9: The determination of the investment pick winner and the award(s). The selection of a new leader or committee to oversee 2025 IG - followed by a pot luck lunch gathering (any offers to host?)