**"The purpose of the *Canadian Money Saver – Calgary Shareclub* is to equip members with knowledge, tools and resources so they feel empowered and confident in taking control of their own financial affairs."**

# New members at all stages of life and financial knowledge are welcome!

# What our Club is

Our Shareclub provides a supportive and social atmosphere to share investment skills, data and know‐how. While each individual member is responsible for making their own investing decisions for portfolio management, a high level of trust exists between members in the sharing of information which enables better investment management decision making.

# What our Club is not

This is not an investment club where members discuss picking specific stocks or sector ETFs and time the market. If that is your interest contact the Calgary chapter of the Canadian Society of Technical Analysts at [Calgary@CSTA.org](mailto:Calgary@CSTA.org)

# The desired atmosphere in the Club is:

* There is an opportunity to learn and acquire portfolio management skills
* Members share their expertise with other members via the meeting education program and discussions or informally by email or phone outside of scheduled meetings
* There is a strong element of trust among members
* There is open interaction with other members with full participation by all
* A learning environment exists

1. Meetings are held once a month.
2. Each meeting starts at 7:00 p.m. and ends at 9:00 p.m.

# Meeting General Agenda

1. Introduction of members and guests
2. Announcements and administrative duties
3. Current financial or investment concern of any member
4. Educational topic presentation(s) made by member(s) on topics. That is followed by a discussion on the presenter's subject
5. A round robin of current/other subjects’ that the members are interested in

# Membership

* Open to anyone who is a subscriber of Canadian Money Saver magazine
* Open to member’s guest(s). If the guest wishes to remain in the club after two trial meetings, they must subscribe to Canadian Money Saver magazine
* There is no limit to the club size as of this date, however once we have 40 regular attendees at the club, we will assess if there is value in splitting it into two separate groups to allow for greater interaction and participation.
* Up to nine (9) geographically remote members will be supported by free video conferencing software, such as Google’s Hangouts or Skype for the educational topic portion of the meeting.
* Currently, there are no membership dues or cost to attend a meeting, however we do reserve the right to charge a minimal fee should it be warranted in the future

Information shared at the club is for education purposes only and does not constitute professional financial advice. Speak to a professional financial advisor to develop the right Financial strategy for You