

The Official Letter of Intent for The Investing Club:

(In July 2019, Mr. King approved the Letter of Intent for The Investing Club; his approval made The Investing Club official.)

Mission statement: The Investing Club's mission involves encouraging RHS students to develop the healthy habit of personal investing (guided by 'value investing' principles) while also allowing students to explore investment management and related careers (e.g. finance, economics, and accounting).

Details regarding The Investing Club:

- How will the meetings be organized?

Aside from the first meeting (which will include an introduction to the club), all of the club's meetings--which will be conducted either during minuteman time (either once a week or once every two weeks) or after school (depending on availability)--will follow a basic structure. If the meeting is conducted during minuteman time, the meeting will spend around 5-10 minutes discussing topics from the Wall Street Journal and other financial publications. This time may also involve a discussion of stocks. The next 5-10 minutes will involve reviewing the pre-meeting assignment, which will likely involve reading articles about important finance/investing concepts (e.g. P/E ratio, EBITDA, Return on Equity (ROE), etc.). The remaining 5-10 minutes will include an activity, which will likely include a virtual investing competition. If the meeting is conducted after school, the first 10-15 minutes will involve students discussing market moving topics. The next 5-10 minutes will include a review of the pre-meeting assignment. The final 10-15 minutes will include an activity. Alternatively, the after school meetings may involve a guest speaker, who will discuss investing itself or careers in related fields. The above structure will be subject to change, depending on the club's general consensus.

- What is the virtual investing competition?

The competition could be one (or two) of two paths. Each individual member could try to build a portfolio, whose gains would be compared to others; the winner(s) may receive a prize. The competition could also be a series of individual stock pitches, where club members vote to allocate some amount of the collective virtual fund. The decision of which type of competition the club will pursue will rest on the club's general consensus.

- Who will include the guest speakers?

The Investing Club will try to invite potential guest speakers. Potential guest speakers may include Certified Public Accountant (CPA) or Certified Financial Planner (CFP) speakers/teachers from business and/or other related fields; potential guest speakers may also include anyone else who is qualified to discuss relevant material.

- How will The Investing Club's leadership be organized?

The Investing Club--in order to effectively allocate tasks--will have five leadership positions (through an election): president, vice president, secretary, treasurer, and news manager. The president will supervise/direct the lesson/meeting and organize future meetings; the vice president will assist the president in his or her job. The secretary will manage the club's communications (e.g. texts, emails, registration, etc.). The treasurer will oversee the club's virtual investing. The news manager will organize the first 5-10 minutes of the meeting by finding relevant, market-moving topics from the news. Alternatively, if the proposed positions proves to be inefficient, the leadership will be replaced with a captain and co-captain, who will distribute the tasks between themselves.

- How does The Investing Club plan to expand?

The Investing Club--in an effort to expand its vision--plans to increase enrollment via announcements, messages in Mr. Dallas's classes (and potentially other related classes), and events (e.g. Frosh Fest, Future's Day, eighth grade orientation day, etc.). The club may also create an independent website, which will (hopefully) be linked from the Revere website; this website will display information regarding investing and The Investing Club.