

Welcome to the Ottawa Share Club

Our club is listed as one of 32 share clubs located across Canada by the Canadian Money Saver magazine headed by Peter Hodson, former CEO of Sprott Asset Management and who is now the principle of 5I Research.

In one form or another, we have been in existence since the mid 1990's and in recent years, we have changed our approach. Currently, the club's direction is determined by a volunteer executive committee. Our club is not-for-profit.

Our membership is open to all. Our requested annual membership donation is \$25 or in the alternative, a \$5 donation for each attended meeting. The fees cover costs associated with monthly meetings and social activities. To keep costs down, we ask that each attendee sign a waiver to avoid insurance costs and requirements.

Our strength is in our membership. Our members have a diversity of *knowledge and experience*. It is the strength of our membership that enables our club to satisfy our key objective which is to share financial knowledge and financially related topics with our membership. But guess what? In doing this, we continue to learn and test our own ideas and knowledge!

There are five facets to the Ottawa Share Club.

1. Monthly meetings which are usually held on the second Tuesday of each month October to May. All of our meetings except one have been held here at the Ottawa Citizen Conference Center. Meetings offer a mix of member and outside specialist presentations as well as group discussions.
2. Stock Talk which deals with stock ideas and trades that people have made from week to week. This meeting is held at the IKEA cafeteria from 10:00 am - 12:00 pm each Monday morning. If you get there before 10:00am, coffee is free.
3. Executive meetings held monthly over dinner focusing on the planning of future events. Any club member is welcome to join the executive team. If you are interested, please contact André Albert at the break or call 613-741-2828 or email ottawashareclub@gmail.com.
4. Informal communication grape vine which takes place daily and weekly between members who are either sharing ideas or bringing news or noteworthy items to everyone's attention or just simple questions that people would like answered.
5. Annual social get together which over the last two years has been held at The Rideau Carleton Raceway.

Some of the topics we have covered over the years include:

- Pitfalls of travel insurance
- Best credit cards to use and the cards to avoid
- Preferred shares; what are they and who should own them and what are the possible pitfalls?
- Preparation of a will; not an easy subject especially with changing tax laws.
- Technical analysis; the MACD, Candlestick charting and other technical analysis tools
- Investing in “arms length mortgages”. Is this for you and how do you do it?
- DRIPS = dividend reinvestment programs
- Annuities (what are they and how are they best used)
- Portfolio construction
- The possible pitfalls in selecting a financial advisor
- The Death Book: Carol Anne Meaghan’s story (Carol Anne was formerly with CTV in Ottawa)

Many of our presentations have been provided by club members. These presentations have been excellent examples of sharing experiences and have given members the opportunity to further research topics.

We have had many presenters from outside the club including but not limited to: Almost all of the major Canadian Banks; a credit specialist from Bank of America – MBNA; a professor from Algonquin College; representatives from the Royal Canadian Mint; foreign exchange (FX) specialists from Montreal; the President of a major Canadian fund company; a Vice President of Horizons ETFs; a representative from Larry Berman’s organization (for those of you who are familiar with Larry); a Certified Public Accountant from BDO and the list goes on and on.

We thank all of these presenters who have given us their time and shared valuable information with our club and in many cases, have travelled from out of town.

As life seems to become more complicated we all have a support group which may include your family, a medical doctor, a dentist, a physiotherapist, property manager, religious leader, a tax preparer and on and on. Think about your support group and how important they are to you on a daily, weekly, monthly or yearly basis. Now add the Ottawa share Club to your support group. We encourage you to join in and participate.

The Ottawa Share Club members run two crowd-sourced fantasy portfolios (growth and income) to promote fun and information exchange. More about them can be found here: <https://money4retirement.ca/ottawa-share-club-fantasy-portfolios/>

To be added to the club’s email list, please email: ottawashareclub@gmail.com

Share Club Facebook Page: <https://www.facebook.com/Ottawa-ShareClub-742338425821855/>

Share Club Web Page: <https://money4retirement.ca/ottawa-share-club-page/>