

# Welcome to the Ottawa Share Club

The Ottawa Share Club was founded in 1998. The club's direction is determined by a volunteer executive committee. Our club is not-for-profit. Our motto is "Share Knowledge, not Capital" and as such it is **not** an investment club where member funds are pooled and invested.

Our membership is open to all (currently at no charge). Our meetings are held virtually during the COVID-19 pandemic. To find out more about upcoming meetings please email the club email address: [ottawashareclub@gmail.com](mailto:ottawashareclub@gmail.com) and ask to be added to the club's mailing list.

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 among our members.

The club holds monthly meetings which are usually held on the second Tuesday of each month. Meetings offer a mix of member and outside specialist presentations as well as group discussions. Our schedule is published here: <https://money4retirement.ca/ottawa-share-club-meeting-calendar>.

Executive meetings are held monthly the week following the monthly meeting. Any club member is welcome to participate and/or join the executive team. If you are interested in attending, please contact the club email [ottawashareclub@gmail.com](mailto:ottawashareclub@gmail.com).

Some of the many 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 "arm's 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)
- Investment trends during the COVID-19 pandemic
- Strategies to minimize tax on retirement
- Investment policy statements
- Value investing
- Investing in secular (thematic) trends
- Investing in real estate
- Investing in gold
- Retirement income planning

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 these presenters who have given us their time and shared valuable information with our club.

Some of the more recent material presented to the club can be found here:  
<https://money4retirement.ca/osc-share-club-member-pages>.

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](mailto:ottawashareclub@gmail.com)**

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

*April 2021*