STEVENS LEGACY
# INVESTMENT CLUB
Est. 2015

**Reactivated April 2023**

## MEMBERSHIP APPLICATION

**A Message from our Club President**

Dear Prospective Member,

Please review this application for Stevens Legacy Investment Club (SLIC) membership. Please answer the questions below on a separate PROFILE sheet and number them (1a,1b, 2a, 2b, etc.). Then, forward your completed PROFILE information to our Membership Chairperson, Ed Stevens, at edsprivatefranchise@gmail.com.

To create a robust membership application for an Investment Club, we aim to gauge the applicant's financial knowledge, investment philosophy, and potential contribution to the group. Below is a mix of questions and topics to include, categorized for clarity: There are no wrong answers. We want to be able to direct new members to areas where they can become more educated in investment strategies.

We also expect all members to complete the following "Partner Honoring" Tasks:
**1**. Pay annual dues of $50.
**2.** Attend all monthly meetings (but if you can't for any reason, contact a club officer and let them know).
**3.** Contribute $30.00 via an "Electronic Payment, i.e., bill payment" monthly as **YOUR INVESTMENT** towards purchasing stocks, bonds, and other securities. You may contribute more than $30 monthly if your "Club Ownership" does not exceed 20%.
**4.** Seek education, refer to resources at www.Betterinvesting.org, and www.Sievert.com, use SLIC resources, e.g., the website www.StevensLegacyInvestClub.com, SLACK, SLIC Private Facebook, and the Handbook, and participate in the club's business.
5. Embrace our charity initiative: P.K. Memorial Foundation (School in Sierra Leone, Africa)

Thanks for your participation,

Gary P. White, President SLIC

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## QUESTIONS and TOPICS for YOUR PROFILE SHEET

**1. Personal Information**

a. **Full Name:**
b. **Contact Information (email, home, and cell phone numbers):**
c. **Occupation and Industry:**
d. **Educational Background (especially in finance, economics, or related fields):**
e. **Club Sponsor**:

**2. Financial Knowledge and Experience**

a. Describe your experience with investing (e.g., stocks, bonds, real estate, or other asset classes).

b. How long have you been actively investing?

c. Have you participated in any other investment groups or clubs? If yes, what role did you play?

d. What types of investment tools or platforms have you previously used? (e.g., brokerage accounts, apps, research tools).

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**3. Investment Goals and Philosophy**

a. What are your primary investment goals (e.g., wealth accumulation, passive income, long-term growth)?

b. How would you describe your risk tolerance (low, moderate, high)?

c. What is your approach to diversification?

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**4. Club Contribution and Collaboration**

a. Why are you interested in joining this investment club?

b. What specific skills or knowledge can you bring to the group (e.g., analytical skills, financial modeling, industry insights)?

c. Are you comfortable presenting investment ideas to a group?

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**5. Commitment and Ethical Standards**

a. Are you willing to commit to regular meetings and active participation in discussions?

b. How much capital are you comfortable contributing to group investments monthly?

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**6. Optional – Additional Insights**

a. Are there specific industries or sectors you are particularly enthusiastic about or knowledgeable in?

b. How do you stay updated on financial news and market trends?

## Prompt Completion and Return of YOUR PROFILE SHEET

**Answering these questions will, we believe, provide a comprehensive picture of each applicant's investment aptitude, collaborative mindset, and alignment with the club's goals. Thank you for promptly returning this profile information to our Membership Chairperson, Ed Stevens, at edsprivatefranchise@gmail.com.**

## STATEMENT OF PURPOSE

**MY COMMITMENT PLEDGE to Honor the Partnership**
**"Empowering generations through purposeful investments and divine guidance!"**

I, (State your name), pledge to be subject to consistency and follow-through in the areas of "Wealth Management and Investing." I AM RELENTLESSLY COMMITTED to taking advantage of the opportunities to benefit from my involvement with the STEVENS LEGACY INVESTMENT CLUB (SLIC). I am mindful of (a) using proven Investing Philosophy, (b) investing a small amount monthly, i.e., $30, and benefiting from dollar-cost averaging, (c) Reinvesting all earnings, dividends, and profits, (d) Investing in quality growth stocks, (e) Diversifying our Portfolio to reduce risk and (f) Honoring Kingdom Laws. I AM FIRMLY COMMITTED to educating myself, investing for a lifetime, attending all designated club meetings, and speaking up and helping. I AM FAITHLY COMMITTED to passionately, confidently, and expeditiously honoring this partnership agreement. I AM ENTHUSIASTICALLY COMMITTED to embracing the principles and practices of "Better Investing," which will take me toward accomplishing substantial investment profits, obtaining my wildly ambitious goals and dreams, and creating generational legacy wealth. This foundational approach will allow me to make a profound difference in my life, my family's life, my business, my community, and the world around me! I AM ENERGETICALLY COMMITTED to the Stevens Legacy Investment Club partnership meeting the purpose of investing the assets of the partnership solely in stocks, bonds, and other securities for education and substantial profit for the partners.