

For myI CLUB.com Investment Clubs

New Investment Club Member Quick Start Guide

QUICK
START
GUIDE

Estimates Source: Thomson/Zacks

2004

2005

2006

2007

2008



myICLUB.com New Member Quick Start Guide

Congratulations on joining an investment club and starting a journey that can lead to a more secure financial future for you and your family! This Quick Start Guide is designed to give you an overview of all of the features of your club's website.

1. Accept the Invitation

To gain access to an investment club's private myICLUB.com website, you must be invited by the club's Administrator or other designated officer. The Administrator or officer may issue an invitation after logging in to the **People** section of the club's myICLUB.com website.

The invitation will arrive in your email inbox with a special link. Click this link to accept the invitation, and then follow the instructions to create your username and password to allow you to access your club's website in the future.



If you have a user name and password for any other ICLUBcentral Inc. subscription product or myICLUB.com investment club, you should use the same username and password for your new club.

The email invitation link must be clicked and the signup process completed before the invitation expires. If the link expires, ask your club Administrator to resend the invitation.

If your club contact notifies you that they have invited you to the club, but you have not received the special email invitation, follow these steps:

1. Check your email junk mail or spam folder to make sure the email was not redirected there by mistake.
2. Verify that the club contact has your correct email address and have them to resend the invitation.



For security purposes the Customer Support team at myICLUB.com and ICLUBcentral Inc. are not able to add or delete members to any investment club. Contact your club's Administrator with any questions about your membership or access to your club's website.

2. Set Up Your Profile and Preferences

Now that you have access to your club's myICLUB website, there are a couple of tasks you should complete to help in the administration of the club and customize your myICLUB experience.

Update Your Member Profile

After you accept the invitation to your club's website, the first task you should complete is updating your **Member Profile**.

To do this, go to the **People** tab, then click your name. Click the **Edit Profile** button at the bottom of the page. This allows you to add or correct the information on this page, including your name, email address, mailing address, emergency contact, and phone numbers.

Only you and your club's Administrator can edit your personal information on myICLUB.com, and only a club Administrator can view the personal information of other members.



Social Security numbers are required for your club to file its annual Federal IRS tax return, as well as with any state that requires filing. Your club may not require that you store the number in your Member Profile; contact your club Administrator with any questions about their policy.

Once you have completed editing your Member Profile, click the **Save Changes** button.

Review or Update Your Preferences

From the **People** page, click the **Preferences** icon to the right of your name. The preferences link is in the **Tools** column and looks like a round gear. Here you can update your user name, password, security questions and answers, and email settings.

For additional security, you can enable 2-factor authentication (2FA) using the **Change authentication setting** link. If you have just created your myICLUB.com user account, you probably don't need to change any of these items.

From the **Preferences** page you can also upload a photo of yourself. This can help your fellow club members get to know you a bit better. Try to pick a photo that shows your face clearly. Don't worry about the size of the photo; we'll resize it for display purposes. After you've chosen a file from your computer, click the **Save Changes** button.

You can click the **View my profile** link to see how your photo looks on your **Member Profile**.

3. Get Acquainted with Your Club's myICLUB.com Website

Your investment club's website has a number of features available to all members. Some functions and features are only available to designated club officers, and you will see a message that you do not have permission to access those pages if you attempt to display them.

Club Home. The landing page of your club's myICLUB website. It gives a summary of club activity. The bottom of this page gives links to educational material in the **Investment Club Hub** section

Accounting. Most of the links on this page allow for adding or editing information. Only Administrators or treasurers have access to these functions. Links for viewing information are available for all members. Don't worry about clicking a "restricted" link and accidentally changing club accounting data. You'll only get a message this feature is not available for you. A club Administrator must give you permission to access links that change data.

Reports. This section has links to access more than 40 reports and graphs available to all members. These reports help monitor and manage the club portfolio. An additional two reports include member information and access is restricted for these to club Administrators.



*Before each meeting of your club, you may be required to log in to myICLUB.com with your username and password, and view the club's current **Valuation Statement** and **Member Status Report** from the **Reports** section. Take some time to get to know the other reports here as well!*

Watch List. A list of interesting companies not yet in the club portfolio that may be good additions. Members may add stocks to the Watch List at any time.

Taxes. A section for members to retrieve their own current and past K-1 from the club. Administrators and treasurers can prepare and e-File the club's tax returns from this area.

People. A list of club members along with tabs to show members the current treasurer(s) and Administrators(s). This is where members can edit their personal profile and preferences. Administrators can add or remove permissions to use myICLUB features.

Voting. Allows for remote voting with different options such as secret ballot, majority vote, as well as setting a closing date for the vote.

Message Boards. A feature to communicate with club members and keep a record of the communications.

File Storage. Store important club records online making them available to all members.

Calendar. Track important dates for you and the club.

Help. Clicking **Help** from any page in myICLUB.com, opens a new window on our **Frequently Asked Questions (FAQ)** website with information about the specific myICLUB page you are on.

4. Get Help

Your club Administrator is your first point of contact with any questions you might have. You can find the names of your club Administrator(s) in the **People** tab. Administrators can reset passwords for their club's members when needed.

If you encounter problems that your club's Administrator can't resolve, please follow these steps:

1. Review the steps in this **Quick Start Guide**, which cover the most common problems and situations encountered by new members.
2. Check the documents and guides in your club's **File Storage** area.
3. Review the answers in the ICLUB.com **Frequently Asked Questions (FAQ)** at www.ICLUB.com/faq/. Chances are good that others have had the same question and the answer can be found here.
4. Contact the ICLUBcentral Support team online at www.ICLUB.com/support/. Please provide as much detail as possible when submitting your question.

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