

myICLUB.com Reports & Graphs

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JULY 2021



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Download Handout

Handout in
PDF format is
available in
Handouts tab.

The screenshot shows the GoToWebinar interface. At the top, there is a menu with 'File', 'View', and 'Help'. Below that is the 'Audio' section, which includes a 'Sound Check' indicator and options for 'Computer audio' (selected) and 'Phone call'. A 'MUTED' status is shown for the microphone. Below the audio section is the 'Handouts: 1' tab, which contains a PDF file named '2018-01 Preparing Club Taxes.pdf'. Below the handouts is a 'Questions' section with a text input field and a 'Send' button. At the bottom, the 'Investment Clubs' logo and 'Webinar ID: 648-511-538' are visible, along with the 'GoToWebinar' logo.

ACCESSING REPORTS & GRAPHS

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Accessing myICLUB.com Reports & Graphs



- Click Reports menu to view.
- Only treasurers (those members with Accounting privileges) can enter, edit, delete transactions & create club's official security valuations.
- All members can view any Report at any time for any date range or other criteria.
 - Key advantage of myICLUB.com is transparency that allows members to access all transactions at any time.

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SHARING REPORTS WITH MEMBERS

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Sharing Reports with Members



- No need to print reports, even for in-person meetings.
- From icons at top of each report, all reports can be printed, generated as PDFs, or emailed to members as link.



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STOCKWATCHER REPORTS

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StockWatcher Reports



- Admin assigns each stock to member.
- Members generate StockWatcher Report for their assigned stocks.
- Can also view report of all member assignments.
- See archived webinar from April 2021 for more on this function.

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StockWatcher

Date Report Generated: 7/20/2021 7:15:39 PM, by Doug Gerlach, Any I.C.

Overview

Apple is in the **Consumer Electronics** industry group, which is a component of the **Technology** sector.

This stock is currently tracked by [Investor Advisory Service](#) (Buy price up to: \$89.00)

With TTM revenues of **\$274,515.00M**, it is considered a **mega**-sized company. With a current market capitalization of **\$2,496,894.08M**, it is a **mega**-cap stock.

Apple appears on the **myICLUB Investment Club Top 40** as of **June 2021**. The myICLUB Top 40 reports on the stocks most widely owned, sold, and purchased by clubs and is updated each month. In the most recent myICLUB Top 40, **Apple** is ranked:

- number 1 of securities most widely owned by investment clubs
- number 1 of securities most purchased by investment clubs
- number 1 of securities most sold by investment clubs

Growth

The most recent quarter ended on **3/31/2021**. For that period, the company **increased** EPS by **119.4%**. This is **higher than** analysts' expected long-term EPS growth. Over the trailing twelve months, EPS **increased** by **39.7%**. This is **higher than** analysts' expected long-term EPS growth.

In that same period, the company **increased** Revenues by **53.6%**. Over the trailing twelve months, Revenues

increased by **21.4%**. How does this recent growth compare to the projected Revenues growth rate on the club's SSG?

Key Features:

- Intended to foster regular & deliberate follow-up by members of all stocks in club portfolio.
- Focused on fundamentals as covered on SSG.

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MONTHLY & FREQUENTLY- ACCESSED REPORTS

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Monthly Reports



- 2 key reports are traditionally offered to members each month:
 - Member Status Report.
 - Valuation Statement.
- Special “Unified Monthly Report” combines these 2 reports & adds transactions since last valuation.

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Valuation Statement



Valuation statement as of 7/1/2021 (generated on: 7/20/2021).

[Create a New Valuation](#) [Edit/Delete an Existing Valuation](#)

Choose from your club's official valuation dates

Include the compound annual return (CAR) in the valuation statement. [\(What's this?\)](#)

Start return calculations from

Submit

Options:

- Select valuation date.
- Include CAR.
- Select date to start return calcs.
- Show/Hide chart at bottom.

Security	Date first purchased	Shares owned	Cost/share	Total cost	Price/share	Market value	% of total
Apple (AAPL)	01/25/07	404.0000	\$16.7307	\$6,759.21	\$137.27	\$55,457.08	16.4%
Air Lease (AL)	06/15/14	200.0000	\$38.0000	\$7,600.00	\$42.42	\$8,484.00	2.5%
Century Communities (CCS)	10/03/17	400.0000	\$36.2750	\$14,510.00	\$67.11	\$26,844.00	8.0%
Duke REIT (DRE)	08/07/11	400.0000	\$10.9350	\$4,374.00	\$47.36	\$18,944.00	5.6%
Extra Space Storage (EXR)	07/01/17	75.0000	\$66.8300	\$5,012.25	\$164.91	\$12,368.25	3.7%
Fastenal (FAST)	06/13/08	120.0000	\$36.1467	\$4,337.60	\$52.06	\$6,247.20	1.9%
Gilead Sciences (GILD)	06/02/09	110.0000	\$63.9918	\$7,039.10	\$69.13	\$7,604.30	2.3%
Globus Medical (GMED)	07/23/20	185.0000	\$54.0500	\$9,999.25	\$78.59	\$14,539.15	4.3%

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Member Status Report

Member status report as of 7/1/2021 (generated on 7/20/2021).

Report date:
 Choose from your club's official valuation dates
 View the member status for a custom date.

7/1/2021 [create a new valuation](#) 7/1/2021

Show member contributions since: 1/1/2021
Start return calculation from: 9/13/1997

Include the compound annual return in the member status report. ([What's this?](#))

Submit

Name	Paid in since 1/1/2021	Total paid in	Paid in plus earnings (Cost Basis)	Units since 1/1/2021	Total units	Market value	Percent ownership
Alphonse_Earl	\$2,515.00	\$2,515.00	\$2,515.00	38.8819	38.8819	\$2,840.31	0.84%
Cod_Alantis	\$215.00	\$14,779.88	\$18,157.41	3.1456	875.3889	\$63,946.86	18.96%
Crabb_Dungy	\$265.00	\$7,028.00	\$7,387.11	3.8587	191.2207	\$13,968.60	4.14%
Dorado_Portia	\$300.00	\$6,734.00	\$7,024.01	4.6308	167.0933	\$12,206.11	3.62%
Finn_Sarah	\$315.00	\$9,634.25	\$8,734.20	4.6308	223.9812	\$16,361.75	4.85%
Gerlach_Doug	\$414.00	\$6,854.00	\$7,120.16	6.1011	161.3979	\$11,790.06	3.50%
Hallbut_Hally	\$315.00	\$8,155.00	\$8,457.75	4.6308	185.8243	\$13,574.40	4.02%

Options:

- Select valuation date/use custom date.
- Select date to show contributions since.
- Select date to start return calcs.
- Include CAR.

Notes

- PIPE – Paid In Plus Earnings.

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Monthly Report

Report for dates from 3/31/2021 to 7/1/2021 (generated on 7/20/2021).

Choose from your club's official valuation dates 7/1/2021 [create a new valuation](#)

Include the compound annual return (CAR) in the valuation statement. ([What's this?](#)) **Submit**

Valuation Statement

Security	Member Status
Apple (AAPL)	
Air Lease (AL)	

Name	Paid in since 3/31/2021	Total paid in	Paid in plus earnings (Cost Basis)	Units since 3/31/2021	Total units	Market value	Percent ownership
Alphonse_Earl	\$0.00	\$2,515.00	\$2,515.00	0.0000	38.8819	\$2,840.31	0.84%
Cod_Alantis	\$0.00	\$14,779.88	\$18,157.41	0.0000	875.3889	\$63,946.86	18.96%
Crabb_Dungy							
Dorado_Portia							

Complete Journal

Date	Type	Cash	Investment	Paid in by members		Dividends and interest received	Misc. received	Gain on sales	Withdrawal Liabilities	Unrealized gains
				DR	DR					
03/31/21	Starting Balance	\$26,463.37	\$116,377.13	\$146,703.36		\$27.12	(\$199.62)	(\$1,875.00)	\$0.00	(\$1,815.36)
05/21/21	Dividend	\$9.18				\$9.18				
05/21/21	Foreign tax					\$1.62	(\$1.62)			
07/01/21	Ending Balance	\$26,472.55	\$116,377.13	\$146,703.36		\$37.92	(\$201.24)	(\$1,875.00)	\$0.00	(\$1,815.36)

Options:

- Select valuation date
- Select date to start return calcs
- Include CAR

PORTFOLIO REPORTS

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Portfolio Reports #1



- **Company Size:** Groups holdings by size of company revenues (mega, large, mid, small, micro).
- **Sector/Industry:** Groups holdings by industry, sector, super sector.
- **EPS Growth Rate:** Groups holdings by projected EPS growth from StockWatcher, Wall St. analysts consensus, or Take Stock estimate.
- **Club Performance:** Benchmarks club performance to market indexes.
- **Portfolio Yield:** Shows dividend metrics for securities in portfolio.

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Club Performance

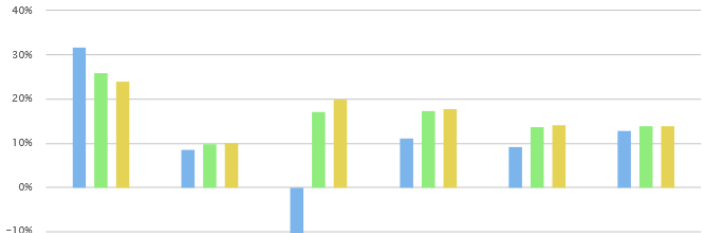




Club Performance & Benchmark Report as of 7/20/2021.

This report can give you a general idea of how your club is performing over time, compared with two different stock market indexes. ([How this report works](#))

	1/1/2021* -	(9/13/1997-7	Compound Annual Return for periods ending			
	7/20/2021**	/20/2021)	December 31			
		Lifetime to Date	1 Year	3 Years	5 Years	10 Years
Club	31.83%	8.53%	-14.45%	11.12%	9.29%	12.98%
Vanguard 500 Index Fund	25.94%	9.79%	17.21%	17.37%	13.78%	13.89%
Vanguard Total Stock Market Index Fund	24.05%	10.09%	19.99%	17.88%	14.14%	14.08%




* Valuation date used: 12/31/2020
** Valuation date used: 7/1/2021



- Replicates club's cash flows as hypothetical purchases/sales in indexes, then calculates compound annual return for club, S&P 500, & Wilshire 5000.
- See "How this report works" for full details.
- Select other indexes & date ranges at bottom.

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Portfolio Yield

Report for date 7/20/2021 (generated on 7/20/2021).

Portfolio Yield: 1.0% **FTM Indicated Dividends (Total): \$3,091.53**

Ticker	Company	# Shares	Current			Payout Ratio	Next Payable		
			Price	Div	Yield		Date	/Share	Total
AAPL	Apple	404.00	\$142.45	\$0.88	0.6%	19.8%	8/13/21	\$0.22	\$88.88
AL	Air Lease	200.00	\$38.95	\$0.64	1.6%	16.3%	10/9/21	\$0.16	\$32.00
CCS	Century Communities	400.00	\$58.68	\$0.60	1.0%	7.2%	6/16/22	\$0.15	\$60.00
DRE	Duke REIT	400.00	\$50.18	\$1.02	2.0%	106.2%	8/31/21	\$0.26	\$102.00
EXR	Extra Space Storage	75.00	\$168.48	\$4.00	2.4%	90.9%	9/30/21	\$1.00	\$75.00
FAST	Fastenal	120.00	\$53.50	\$1.12	2.1%	74.2%	8/24/21	\$0.28	\$33.60
GILD	Gilead Sciences	110.00	\$68.23	\$2.84	4.2%	1234.8%	9/29/21	\$0.71	\$78.10
MLR	Miller Industries	210.00	\$37.11	\$0.72	1.9%	29.9%	9/14/21	\$0.18	\$37.80
RPM	RPM	97.84	\$87.64	\$1.52	1.7%	43.4%	7/30/21	\$0.38	\$37.18
RY	Royal Bank of Canada	10.00	\$98.57	\$4.32	3.6%	36.3%	8/24/21	\$1.08	\$10.80
SWKS	Skyworks Solutions	175.00	\$187.15	\$2.00	1.1%	27.7%	9/1/21	\$0.50	\$87.50

Notes

- Useful for identifying expected yield & spotting securities where dividend may be at risk.

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Portfolio Reports #2



- Use StockWatcher's judgment from BetterInvesting Online Tools & replicate reports found in BI tools or Toolkit 6:
 - **Portfolio Review:** Summary or extended version, flags potential problems.
 - **Portfolio Offense:** Flags potential valuation/total return problems.
 - **Portfolio Defense:** Flags potential fundamental company problems.
 - **Portfolio Summary:** Shows potential buys in current portfolio.
 - **Portfolio Trend:** Shows key fundamental & growth factors over time.
 - **Portfolio Gain/Loss:** Shows simple gain/loss of each holding, or for each tax lot.

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Portfolio Review Report



A comprehensive summary of key fundamental changes and values of stocks in the club's portfolio, using data and judgment from each **StockWatcher's** most recent BetterInvesting **SSGPlus** stock study. ([How do I import my SSGs?](#))

Show extended report

Tip: Move your mouse over the column headers to display definitions.

Company	EPS		Sales		Pre-Tax Profit		TTM EPS		Proj PE	Price	Proj RV	Est EPS Growth	PEG Ratio	Rwtd / Risk Ratio	% Total Ret
	Qtr End	% Chg	% Chg	% Chg	% Sales	% Chg	Proj	Price							
AAPL <small>(Doug Gerlach, 4/20/2021)</small>	12/20	34.6	21.4	29.6	30.1	16.6	32.7	134.16 4/16/21	204.6	11.0	3.0	-0.1	-0.2		
AL <small>(Earl Alphonse, 3/25/2021)</small>	12/20	-33.8	-10.8	-33.2	28.2	-13.8	9.7	46.67 3/24/21	128.7	10.1	1.0	1.0	9.7		
CCS <small>(Russell Malley, 7/20/2021)</small>	03/21	284.6	67.4	284.4	13.0	120.3	6.0	58.68 7/19/21	69.5	17.5	0.3	14.2	28.0		
DRE <small>(Unassigned, No SSGPlus Link)</small>	3/21	320.0	27.8	336.7	29.5	-12.7	48.2	47.36 7/1/21	N/A	N/A	N/A	N/A	N/A		
EXR <small>(Doug Gerlach, No SSGPlus Link)</small>	3/21	84.3	7.9	85.6	61.2	32.1	35.7	164.91 7/1/21	N/A	N/A	N/A	N/A	N/A		
FAST <small>(Earl Alphonse, No SSGPlus Link)</small>	6/21	0.0	-0.1	0.5	20.9	4.1	31.7	52.06 7/1/21	N/A	N/A	N/A	N/A	N/A		

Notes:

- Shading spotlights potential areas of trouble.
- Move mouse over headers for definitions.
- Click header to sort column.
- N/A appears for stocks with no SSG assigned or linked.

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Portfolio Summary Report



A quick overview of stocks that might be compelling buys or sells, using data and judgment from each StockWatcher's most recent BetterInvesting SSGPlus stock study. ([How do I import my SSGs?](#))

Ticker	Company	% Port	Price Date	Price	P/E	Proj				
						Rel Val	Tot Ret	Rwd Rsk	Buy Blw	Sell Abv
AAPL	Apple <i>(Doug Gerlach, 4/20/2021)</i>	17.8	4/16/2021	134.16	36.3	245.5%	-0.2	-0.1	60.70	103.20
AL	Air Lease <i>(Earl Alphonse, 3/25/2021)</i>	2.7	3/24/2021	46.67	10.6	140.7%	9.7	1.0	34.20	58.70
CCS	Century Communities <i>(Russell Malley, 7/20/2021)</i>	8.6	7/19/2021	58.68	7.0	81.6%	28.0	14.2	86.90	163.60
DRE	Duke Realty Corp <i>(Unassigned)</i>	6.1	7/1/2021	47.36	49.4	79.0%	<i>No SSGPlus Link Established</i>			
EXR	Extra Space Storage Inc <i>(Doug Gerlach)</i>	4.0	7/1/2021	164.91	37.5	121.0%	<i>No SSGPlus Link Established</i>			
FAST	Fastenal Co <i>(Earl Alphonse)</i>	2.0	7/1/2021	52.06	34.5	130.2%	<i>No SSGPlus Link Established</i>			
GILD	Gilead Sciences <i>(Russell Malley, 4/5/2021)</i>	2.4	4/2/2021	66.44	830.5	5220.4%	3.6	0.4	59.90	66.70
GMED	Globus Medical <i>(Doug Gerlach, 3/23/2021)</i>	4.7	3/22/2021	61.34	61.3	184.7%	4.1	0.3	33.90	61.40
MLR	Miller Industries Inc. <i>(Doug Gerlach)</i>	2.7	7/1/2021	39.74	16.5	121.3%	<i>No SSGPlus Link Established</i>			

Notes:

- Useful for quick review of stocks in current portfolio.
- Move mouse over headers for definitions.
- Click header to sort column.
- Limited data for stocks with no SSG assigned or linked.

LL

GRAPHS & CHARTS

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Using Graphs & Charts



- Visual representation of data is often easier for members to understand.
- Some graphs replicate data that is provided in other reports, so you can choose which reports or graphs to share or emphasize.

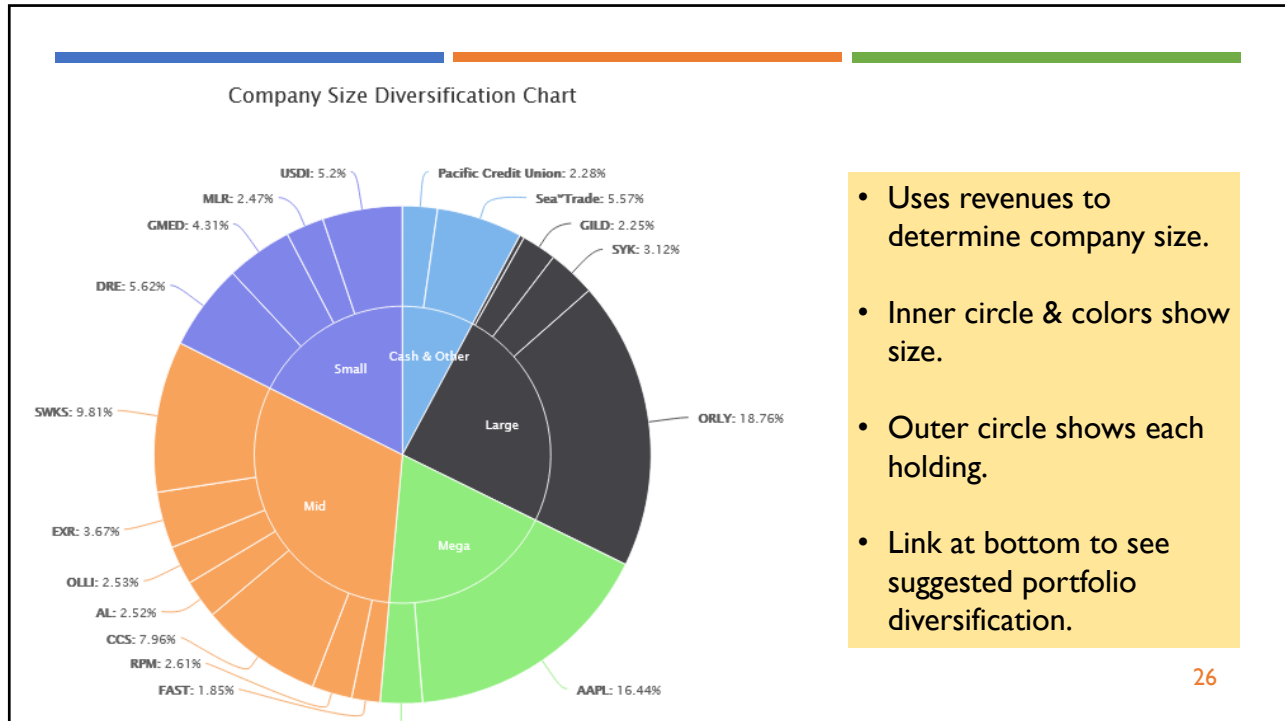
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Graphs & Charts



- **Company Size:** Pie chart by size of company revenues (mega, large, mid, small, micro).
- **Sector/Industry:** Pie charts by industry, sector, super sector.
- **Portfolio Heatmap:** Shows amount & gains of each holding.
- **Club Assets:** Pie or bar chart of holdings by % of each.
- **Club Unit Value:** Line chart of club's unit value.
- **Member Ownership:** Pie or bar chart of each member's ownership by %.
- **Portfolio Performance:** Line chart of club's or single member's cost basis & unit value.
- **Security Performance:** Line chart of single security's cost basis & unit value.

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SPECIALIZED REPORTS

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Specialized Reports



- **Cash Journal:** Shows cash flows in/out of club accounts.
- **Complete Journal:** Shows transactions by type.
- **Transaction Summary:** Sub-totals transactions by type.
- **Member Deposits:** Shows all member payments & fees for date range & total.
- **Member Unit Ledger:** Shows list of units purchased/removed for members.
- **Security Ledger:** Shows buys, sells, distributions, taxes, splits for securities.

Petty Cash Contributions/Journal are no longer supported, but will appear for legacy clubs.

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Member Unit Ledger



Report for dates from 1/1/2020 to 12/31/2020
 (generated on 7/20/2021).

Start each member on a new page (PDF only)

Crabb, Dungy

Date	Transaction	Unit Value	Paid in this date	Total paid in to date	Total paid in plus earnings to date	Units purchased	Total units
01/01/20	Starting balances			\$4,748.00	\$4,888.17		159.739302
01/01/20	Deposit cash	\$73.61	\$600.00	\$5,348.00	\$5,488.17	8.150763	167.890065
03/02/20	Deposit cash	\$66.92	\$100.00	\$5,448.00	\$5,588.17	1.494378	169.384443
04/10/20	Deposit cash	\$60.53	\$200.00	\$5,648.00	\$5,788.17	3.304175	172.688618
05/01/20	Deposit cash	\$68.65	\$100.00	\$5,748.00	\$5,888.17	1.456728	174.145346
05/08/20	Deposit cash	\$68.65	\$200.00	\$5,948.00	\$6,088.17	2.913456	177.058802
07/01/20	Deposit cash	\$77.65	\$600.00	\$6,548.00	\$6,688.17	7.727399	184.786201
07/01/20	Deposit cash	\$77.65	\$100.00	\$6,648.00	\$6,788.17	1.287900	186.074101
07/09/20	Deposit cash	\$77.65	\$100.00	\$6,748.00	\$6,888.17	1.287900	187.362001
11/13/20	Member fee		\$15.00	\$6,763.00	\$6,903.17	0.000000	187.362001
12/31/20	Distributed earnings		\$218.94	\$6,763.00	\$7,122.11	0.000000	187.362001
Dungy Crabb's value as of 12/31/20: \$11,834.96.							

Useful for members to confirm their monthly member payments have been made.

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Security Ledger



Report for dates from 1/1/2001 to 7/20/2021 (generated on 7/20/2021).

Security Ledger for Royal Bank of Canada

Date	Transaction	Shares	Price/share	Amount	Block	Total shares	Total cost basis
1/1/2001	Starting balances					0.000000	\$0.00
9/22/2017	Buy security	10.000000	\$613.20	\$6,132.00	1	10.000000	\$6,141.99
2/24/2020	Dividend	0.000000		\$8.92		10.000000	\$6,141.99
2/24/2020	Foreign tax	0.000000		\$1.58		10.000000	\$6,141.99
5/22/2020	Dividend	0.000000		\$9.18		10.000000	\$6,141.99
5/22/2020	Foreign tax	0.000000		\$1.62		10.000000	\$6,141.99
8/24/2020	Dividend	0.000000		\$9.18		10.000000	\$6,141.99
8/24/2020	Foreign tax	0.000000		\$1.62		10.000000	\$6,141.99
11/24/2020	Dividend	0.000000		\$9.18		10.000000	\$6,141.99
11/24/2020	Foreign tax	0.000000		\$1.62		10.000000	\$6,141.99
2/24/2021	Dividend	0.000000		\$9.18		10.000000	\$6,141.99
2/24/2021	Foreign tax	0.000000		\$1.62		10.000000	\$6,141.99
5/21/2021	Dividend	0.000000		\$9.18		10.000000	\$6,141.99

- All transactions related to security are listed.
- Blocks (tax lots) are identified for stocks with multiple purchases.

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OCCASIONAL REPORTS

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Occasional Reports #1



- **Security Distributions:** Lists all dividends/distributions & qualifying amount, can be subtotaled by security.
- **Member Withdrawal:** Shows details of member's full or partial withdrawal from club.
- **Withdrawals Summary:** Lists all full and partial withdrawals.
- **Member Tax Summary:** Shows year's taxable income/expenses for members, useful for sharing before K-1 is available.
- **Allocation of Income/Expenses:** Shows year's taxable income/expenses for all members.

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Member Withdrawal Distribution



Partial stock withdrawal for Alantis Cod on 1/30/2020
 Valuation date: 12/31/2019

Member's share of Distributions
 Long Term Capital Gain (\$29.12)

Securities Transferred (including basis adjustments)

Date Purchased	Symbol	Company	Shares	Fair Market Value	Club's Cost Basis	Partners Adjusted Basis
01/25/07	AAPL	Apple	16.0000	\$4,698.40	\$197.84	\$197.84
				\$4,698.40	\$197.84	\$197.84

Withdrawal details (including tax consequences)

Gross withdrawal amount (67.9230 units at \$73.61 per unit)	\$5,000.00	Tax Basis prior to withdrawal	\$16,020.85
Fees and penalties	- \$10.00	Current Year Earnings / (Loss)	+ (\$29.12)
Net withdrawal amount	= \$4,990.00	Adjusted Tax Basis	= \$15,991.73
Cash received	\$291.60	Cash Received	\$291.60
Stock value withdrawn	+ \$4,698.40	Member's adjusted basis in stock withdrawn	\$197.84
		Realized Gain (Loss)	\$0.00

- Member Withdrawal Report includes information needed for member's personal tax returns.

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Security Dividends



Report for dates from 1/4/2020 to 12/31/2020 (generated on 7/20/2021).

Apple					
Date Paid	Ex-Div Date	Security	Qualifying Amount	Non-Qualifying Amount	Remarks
2/13/2020	2/7/2020	Apple	\$331.10	\$0.00	
2/14/2020	2/8/2020	Apple	\$313.90	\$0.00	
8/15/2020	8/9/2020	Apple	\$53.90	\$0.00	
Total:			\$698.90	\$0.00	

• Sub-totaled version makes it easy to locate missed transactions at year-end.

Duke REIT					
Date Paid	Ex-Div Date	Security	Qualifying Amount	Non-Qualifying Amount	Remarks
2/28/2020	2/13/2020	Duke REIT	\$0.00	\$94.00	
5/31/2020	5/13/2020	Duke REIT	\$0.00	\$86.00	
8/30/2020	8/14/2020	Duke REIT	\$0.00	\$86.00	
11/29/2020	11/13/2020	Duke REIT	\$0.00	\$94.00	
Total:			\$0.00	\$360.00	

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Occasional Reports #2



- **Capital Gains:** Lists gains/losses from security sales, can be subtotaled by security.
- **Income Statement/Balance Sheet:** Standard financial statement.
- **Member Payments & Fees:** Shows each members total payments & fees for selected period.
- **Member Info List:** Contact information for members.
- **Address Labels:** Member addresses in printable label format.
- **Security Lot Basis:** Shows cost basis & unrealized gains losses for each tax lot.
- **Sold Securities:** Shows securities sold & calculates performance since sale date for each security & market averages.

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Sold Securities Report



Any I.C.
 Valuation date used: 7/1/2021, generated on: 7/20/2021

Security	1st Purchased	Total Cost	Date Sold	Total Proceeds	% Gain/Loss	Compound Annual Return Since Sale Date for:			Notes
						Security ¹	Vanguard Total Stock Market	Vanguard 500	
Churchill & White (CHDWH)	01/24/00	\$523.25	07/14/20	\$4,789.50	815.3%	-11.2%	41.05%	44.74%	
First & Last Capital (FLCPT)	11/09/16	\$104.59	02/04/20	\$170.90	63.4%	-5.5%	23.88%	25.95%	
Garden Restaurants (GRDNR)	07/13/14	\$1,131.68	07/10/20	\$1,668.00	47.4%	-9.3%	40.51%	44.15%	
Landers Ensalada (LEXX)	06/02/17	\$5,735.00	03/18/21	\$3,860.00	-32.7%	18.9%	52.02%	49.24%	
LastGen Healthplan (LGHPN)	12/10/15	\$5,658.00	02/01/20	\$4,824.01	-14.7%	2.2%	23.73%	25.79%	

- If stock underperformed broader market since sale date, sell was probably a good idea.
- If stock outperformed market since sale date, probably would have been better to hold.

FINAL THOUGHTS

Final Thoughts



- Too much information can lead to overload or analysis paralysis.
- Determine what reports your club wants to see & on what time frame.
- Feel free to share ideas for new reports or graphs we can add to myICLUB.com.

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Questions?



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Thank You!

CONTACT ME AT GERLACH@ICLUB.COM WITH ANY QUESTIONS.

