

# Getting Help With myICLUB: Chatbots, FAQs, Guides, & More

MYICLUB.COM INVESTMENT CLUB WEBINAR – SEPTEMBER 2026



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## Your Hosts



**Douglas Gerlach**  
*President,*  
ICLUBcentral Inc.



**Russell Malley**  
*Club Accounting Advisor,*  
myICLUB



**Sean Pulrang**  
*Senior Support*  
*Representative,*  
myICLUB

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## Handout & Questions



Handout for this webinar is available in PDF  
format in **Materials** section.

Type questions into **Questions** box.

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## GETTING HELP WITH MYICLUB.COM

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## Getting Help with myICLUB



- AI Chatbot.
- myICLUB Forums.
- Live & Archived Webinars.
- FAQ Site.
- Context Sensitive Help Pages.
- User & Quick-Start Guides.
- Online Ticket/Email Support.
- Toll-free Phone Support.



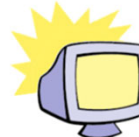
Click the Help links on pages for context-sensitive help.



Visit our Investment Club Forum (registered myICLUB users only).



Download the myICLUB User and Quick Start Guides, and other resources.



Watch our informative videos and webinar replays.



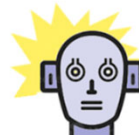
Check our answers to Frequently-Asked Questions.



Submit a support request online.



Contact us by telephone.

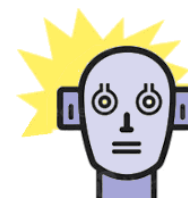


Ask our AI chat agent.



## AI SUPPORT CHATBOT

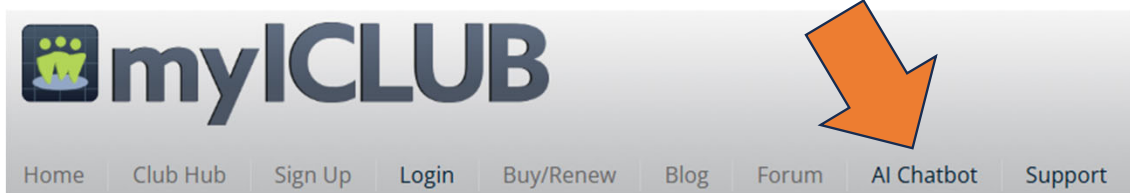
SEARCHING YEARS OF ARTICLES IN SECONDS



## myI CLUB AI Chatbot



- Located at [www.myiclub.com/ai/ask.aspx](http://www.myiclub.com/ai/ask.aspx) or by going to [www.myiclub.com](http://www.myiclub.com) & clicking **AI Chatbot** tab. Does not require login.



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## myI CLUB AI Chatbot



- Chatbot has access to decade+ of published articles, blogs, manuals & FAQs related to myI CLUB.com.
- Type in 2 tickers that recently merged, click **Send** & get full set of steps.
- Or ask **new member first deposit** for steps on adding new member & entering their first payment.

### AI Chatbot

myI CLUB AI Support Chatbot

Hi! Ask me anything about myI CLUB. I answer using our Help Center articles.

Copy

QXO, Inc (QXO) and TopBuild (BLD)

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## Results from Our Library



Certainly! Here's an overview and guidance for the QXO, Inc (QXO) and TopBuild (BLD) merger that took place in July 2026:

### Merger Details:

- **Date:** July 1, 2026
- **Transaction:** QXO, Inc completed its merger with TopBuild (BLD).
- **Shareholder Options:** TopBuild shareholders could choose either:
  - \$505.00 in cash per BLD share, or
  - 20.20 QXO shares per BLD share.
- **Default:** If no choice was made, the all-stock option (20.20 QXO shares) was
- **Proration:** The all-cash option was oversubscribed, so payouts were prorated. Received approximately \$249.67 in cash and 10.212 QXO shares per BLD share. (Source: TopBuild (BLD) - July 2026. last updated July 2026).

ICLUBcentral and author of several books on investment clubs and investing.

You can find recent blog posts directly from the Club Home Page under the "Recent Posts" section. The posts cover updates to the website, news about other ICLUBcentral tools and services. ("What is the Club Home Page?" last updated 2022).

Additionally, the blog is highlighted in the Club Hub section, where you can check for updates from Doug Gerlach and the ICLUBcentral team ("myICLUB Club Hub" last updated 2022).

To access the blog:

ot

ide:

UB.com website.

age section and look for the Free Resources library.

ip and Support pages on the site.

,com User Guide (PDF)" ([Source: myICLUB.com User Guide, revised 30 September

### myICLUB.com Support Center

#### Step 1: Add the New Member

1. Click the **People** tab near the top of the page.
2. Click the **Add member** link on the left side.
3. Enter the member's name and (optionally) email address.
  - If you enter an email, an invitation will be sent automatically when you click OK.
  - If you leave the email blank, you can send an invitation later using the **Send Invitation** link or the **invite online** link next to the member's name.

(Source: "After your next meeting," last updated 2023-09-19)

#### Step 2: Enter the Member's Deposit

1. Go to the **Accounting** tab.

## Narrow Scope Means Fewer False Positives



- AI Chatbot only has access to information on myiclub.com.
  - Ask how to structure partnership & answers come from articles & tailored to BetterInvesting-style partnerships.
- Ask ChatGTP & you will probably need to ask 3 or 4 clarifying questions.
  - May eventually end up with same answer, but dealing with system that scours web also means you're more likely to get advice that doesn't apply to our partnership accounting & tax systems.



## USER & QUICK-START GUIDES

PDFS TO GET YOU STARTED & KEEP YOU GOING



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## Guides for Officers & Members



- Multiple written guides, helping Members & Officers with topics from just starting to general use of site.
- Go to **File Storage > Free Resources from myICLUB.com**

g Discussions **File Storage** Calendar Videos Help



- ▶ **Partnership/ByLaws** (2)
- ▶ **Pictures** (1)
- ▶ **Stock Docs** (0)
- ▶ **Stock Research** (4)
- ▶ **Watch List** (0)
- ▶ **Free Resources from myICLUB.com** (9)
- ▶ **Tax Archives** (25)

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## Guides for Officers & Members



- General guide on starting investment club (finding members, organizing meetings, partnership agreements, registering your partnership, etc.).
- Quick Start guides on SSGPlus linking, getting started for new members, & for new treasurers.
- Year-end Audit instructions.
- General purpose user guide.
- All are free to download & don't count towards club storage limit

### ▼ Free Resources from myICLUB.com (9)

|                                                                     |          |
|---------------------------------------------------------------------|----------|
| <a href="#">myICLUB Guide to Starting an Investment Club (EPUB)</a> | 09/03/26 |
| <a href="#">myICLUB Guide to Starting an Investment Club (PDF)</a>  | 09/03/26 |
| <a href="#">myICLUB User Guide (PDF)</a>                            | 09/03/26 |
| <a href="#">Year-End Audit Procedures (PDF)</a>                     | 09/03/26 |
| <a href="#">myICLUB Bonus Tips - Volume 1 (PDF)</a>                 | 09/03/26 |
| <a href="#">myICLUB Bonus Tips - Volume 2 (PDF)</a>                 | 09/03/26 |
| <a href="#">myICLUB SSGPlus Link Quick Start Guide (PDF)</a>        | 09/03/26 |
| <a href="#">myICLUB New Member Quick Start Guide (PDF)</a>          | 09/03/26 |
| <a href="#">myICLUB New Treasurer Quick Start Guide (PDF)</a>       | 09/03/26 |

### ► Tax Archives (25)

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## INVESTMENT CLUB FORUM

DISCUSS WITH OTHER TREASURERS & CLUB MEMBERS



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## Getting to Forum



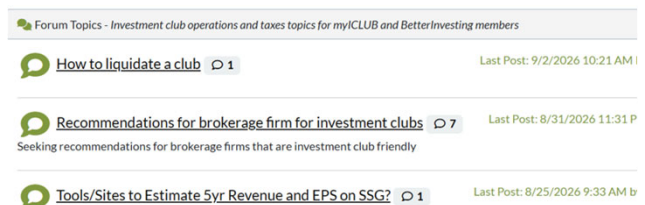
- Click **Forum** or **Club Forum** from myI CLUB.com, or click **Go to club forum** from your club's **Home** tab.
- Forums require login, so there's less chance of spam from non-members.



## Main Forum



- All topics sorted by most recent comment.
- All topics have member name & date of post or comment.
- Click title to see all comments.
  - When viewing comments, site starts with oldest first.



## Browsing Forum



- Club Home tab always shows 3 topics with most recent posts. Click to go to topic.
  - Or from main Forum page [www.myiclub.com/forum/?forum=1](http://www.myiclub.com/forum/?forum=1) click topic.
- Also possible to search text in posts.
  - Click **Forum Search** near top of page. Type & click search to look for text from any post.

Investment Club Forum

Investment Club Forum Forum Search Forum Help

Forum Topics - Investment club operations and taxes topics for myICLUB and BetterInvest

How to liquidate a club 1

Recommendations for brokerage firm for investment clubs 7

Last Post: 8/31/2026 11:31 P

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## Post & Reply



- Topics always show oldest post first.
- Click Reply to reply to specific comment, or Post Reply to add new comment to topic.
- Some accounts marked MODERATOR so you know answer is coming from trusted source.

How to liquidate a club Next Topic

9/1/2026 6:41 PM

There are three members in our club and we have decided to divide the shares owned among the owners rather than sell stock. Is there a recommended way to do this and is there a calculator in this website for this purpose? I have not found it.

Delete Edit Reply

Sean Pulrang, MODERATOR, 9/2/2026 10:21 AM

When talking about dissolving a club, we suggest each security is divided among all members based on their percentage of ownership (units). There isn't a built in tool for making this calculation, so you will want to get a pad of paper and a calculator, or set up a spreadsheet and work out dividing the shares of each stock between the three members.

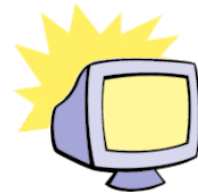
Delete Edit Reply

+ New Topic + Post Reply



## WEBINARS

LIVE EACH MONTH WITH EXPERTS & REPLAYS FROM ARCHIVES



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## myICLUB Webinars



- Webinars presented live once on third Tuesday, starting at 9pm Eastern Time.
- Previous webinars & schedule of upcoming shows are posted at myICLUB.com; click **Videos** tab when signed in to your club
- Videos replays posted at [www.youtube.com/ICLUBcentral/](http://www.youtube.com/ICLUBcentral/) or search **myICLUB** in YouTube.
- Some topics (year-end closing, tax prep, tax clinic) repeat each year; some come up more organically as needed.

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## FREQUENTLY ASKED QUESTIONS (FAQS)

WRITTEN INSTRUCTIONS & INFO ON RANGE OF TOPICS



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## FAQs



- FAQs written by ICLUBcentral staff.
- Access from [www.myiclub.com/faq](http://www.myiclub.com/faq).
- FAQs divided into sections & subsections.
  - **Club Transactions** section has separate subsections on Mergers & Spinoff & Others.
  - **myICLUB** has subsections on each major tab shown when signed in to your club.

### Club FAQs

Club Fundamentals  
Club Primers & Tutorials  
Club Transactions  
myICLUB  
myICLUB Club Tax  
General Technical

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## HELP PAGES & DIRECT CHAT

LEARN ABOUT SPECIFIC PAGE OR ASK QUICK QUESTION

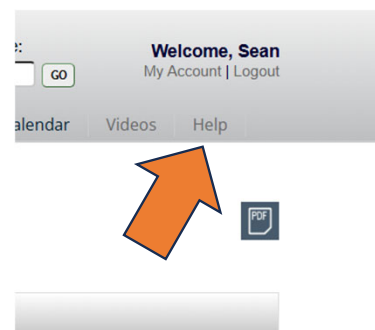


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## Context Sensitive Help



- Available from any page while signed in to myICLUB.
- Click **Help** tab & get FAQ page dedicated to explaining myICLUB page you were on.
- All help pages are part of FAQ.
- Help link makes finding specific FAQ page as quickly as possible.



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# myICLUB.com Investment Club Webinar

## By Doug Gerlach, ICLUBcentral Inc.

[Watch List](#)
[Taxes](#)
[People](#)
[Voting](#)
[Discussions](#)
[File Storage](#)
[Calendar](#)
[Videos](#)
[Help](#)

### Valuation Statement

Valuation statement as of 8/22/2026 (generated on: 9/3/2026).

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

Choose from your club's official valuation dates 8/22/2026

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

Start return calculations from 1/1/2020

Click Help at top right of any page & FAQ opens, describing report or whatever else you were looking at

### Valuation Statement

The Valuation Statement report shows the consolidated club portfolio and cash balance for a specific valuation date. You can also use this report to create and save a new valuation.

You can access a valuation report from the club home page by clicking the "Latest Valuation" link on the left. The club treasurer should print a copy of the Valuation Statement prior to every meeting, and distribute it to every club member at the meeting or let them know that it is available on the club web site so that they may print a copy on their own

The Valuation is divided into five sections:

- Options -- Choose from existing valuation dates, include Compound Return figures, or start a new valuation
- Securities -- See saved information on your club stocks, including share and cost totals
- Cash Accounts -- Total cash account balances
- Summary -- Non security and cash account information.
- Chart -- A graphic representation of the % of total club value of all cash and securities

| Security                   | Date of first buy | Share own |
|----------------------------|-------------------|-----------|
| Apple Inc (AAPL)           | 08/31/20          | 2         |
| AbbVie Inc (ABBV)          | 07/28/21          | 2         |
| Artisan Partners (APAM)    | 01/11/22          | 8         |
| British American Tob (BTI) | 08/20/21          | 5         |
| Canadian Natural Res (CNQ) | 10/18/22          | 8         |
| Chesapeake Util Cp (CPK)   | 07/28/23          | 2         |
| Enbridge Inc (ENB)         | 06/15/26          | 2         |

## Direct Chat



- During most business hours, ask quick questions to myICLUB staff.
- Click Green Chat tab while signed in.
- Chat is intended to help answer quick questions.
  - Good for reminder about how to enter new member's first deposit.
  - Not so good for walk-through of first time preparing club's taxes.

#### ★ Expiration Date

Your myICLUB subscription expires October 13, 2029. BetterInvesting (BI) clubs receive a \$62 discount. Since BI club dues are only \$52, BI registration pays for itself with this discount alone. Not a member? Register with BetterInvesting.

[Renew my subscription](#)

#### Investment Club Forum

- Recommendations for brokerage firm for investment clubs
- How to liquidate a club
- Tools/Sites to Estimate 5yr Revenue and EPS on SSG?

[Go to club forum](#)



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## Direct Chat



- Click Green Chat button, fill in some info & click **Start Chat**.
- A representative reviews question to see if they can give an answer, need more detail, or direct you to use another option.



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## Direct Chat



How can we help you?

**myICLUB**

Welcome to Online Support!

Please select the department you would like to reach:

Customer Service

Your Name: Sean Pulrang

Email Address: sean@iclub.com

Your Question: How do I enter a member deposit?

Start Chat

myICLUB

10:04 AM Welcome Sean Pulrang! Your request has been directed to the Customer Service department. Please wait for our operator to answer your call.

Sean Pulrang 10:04 AM

How do I enter a member deposit?

ICLUB 10:06 AM

To enter a member deposit in myICLUB, follow these steps:

Go to the Accounting Tab  
Click the Accounting tab at the top of your myICLUB dashboard.

Select Members > Deposit  
On the left-hand side, click Members, then select Deposit.

This opens the Record Member Deposits page.

Enter Deposit Amounts  
You can enter a deposit for each member

Type your message here

- To save answer, use **Print** or **Mail** button, or email yourself copy of chat log text.

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## ONLINE TICKET / EMAIL SUPPORT

HELP WITH CLUB TRANSACTIONS OR RECORDS



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## Submit a Support Ticket



- From myiclub.com (not signed in) click **Support** near top of page, then **Submit Support Request Online**.
- Support team members can check your club records, so submitting ticket is good way to get help with troubleshooting entry you have made or for questions about what you are seeing on report.

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# Support Ticket Submission



## Support Ticket

Username  (optional)  
First name   
Last name   
Email   
Phone number  ext  (optional)

Enter your question or problem below.

Summary:

Details:

### ICLUBcentral Customer Support Ticket

Product myICLUB  
Operating system   
Club name  (optional)  
Username  (optional)  
First name   
Last name   
Email   
Phone number  ext  (optional)

Enter a description of your technical problem below. Please include the answers to the following questions:

1. What is the exact error that you get? If possible, provide the steps you took prior to the problem so we can try to re-create the same problem here.
2. Are you working on a personal computer or a mobile device (phone or tablet)?
3. If you are using one of our websites, please visit <https://www.whatsmybrowser.org> or <https://www.whatsmybrowser.info> and provide the information in the "Browser Details" section (you can copy and paste into the box below).

My question is about

Summary:

Details:

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## PHONE SUPPORT:

FOR QUICK QUESTIONS OR IF NOT SURE WHERE TO START



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## Telephone Support



- Phone support is available from 9:30 AM - 6:00 PM ET, Mon-Fri. (extended to 9:00 PM ET on Thursdays) by calling 877-33-ICLUB
- Phone support is great for:
  - Quick questions “How do I rename stock”, “Should I use Member Fee”, etc.
  - Also for when you’re not sure how to proceed, or maybe not quite sure how to get started:
    - Entering your first stock+cash withdrawal.
    - When you’ve watched Preparing taxes webinar twice but still not sure if you have REIT, Mutual Fund, ETF, or ADR.
    - Club members are asking about investing in Options trading

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## Summary of All Help Options



- Ask AI Chatbot.
  - [www.myiclub.com/ai/ask.aspx](http://www.myiclub.com/ai/ask.aspx)
- Review Manuals & Quick Start Guides:
  - myICLUB.com > File Storage > Free Resources.
- Talk with other members on Forums.
  - [www.myiclub.com/forum/](http://www.myiclub.com/forum/)
- ICLUBcentral Webinars.
  - [www.ICLUB.com/webinars/](http://www.ICLUB.com/webinars/)
- Check FAQs at [www.ICLUB.com/faq/](http://www.ICLUB.com/faq/)
- Click **Help tab** on any myICLUB.com page.
- Click **Chat** button on myiclub.com during most business hours.
- Submit support request.
  - [www.iclub.com/support/new\\_ticket.aspx](http://www.iclub.com/support/new_ticket.aspx)
- Call myICLUB Support.
  - 877-33-ICLUB, 9:30 AM - 6:00 PM ET, Mon-Fri (and 9:00 PM on Thursdays)

# Questions?



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## Our Next Investment Club Webinar



Tuesday, October 20, 2026

## **Your Investment Club Report Card:**

Checking on Health of Your Club.

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# Thank You!

CONTACT US AT [WWW.MYICLUB.COM](http://WWW.MYICLUB.COM) WITH ANY QUESTIONS.

