



# 2008 ANNUAL CLUB SURVEY SUMMARY DATA

BETTERINVESTING - Puget Sound Chapter

ALL INFORMATION BASED ON THE NUMBER OF CLUBS THAT RESPONDED

Not all clubs responded to all questions.

Values were calculated using the closing price / share for April 30, 2008 as reported by Yahoo!

CLUB TOTALS AS REPORTED			CHAPTER AVERAGES		
Clubs Reporting	25.4%	93		<u>Average</u>	<u>Median</u>
All Men Clubs	3.2%	3	Number of Members in Club	11.4	11.0
All Women Clubs	68.8%	64	Club Age (years)	14.8	11.5
Mixed Clubs	28.0%	26	Monthly Investment per Member	\$49	\$40
Clubs in Chapter		366	Est. Portfolio Value / Club	\$102,859	\$55,642
Total Members	25.3%	1,058	Est. Cash on Hand / Club	\$6,837	\$2,599
Men	20.2%	214	Number of Stocks / Club	13.7	13.0
Women	79.8%	844			
Club Members in Chapter		4,189			

CLUB AGE BREAKDOWN				CLUB SIZE BREAKDOWN			
New	1	10 - 11 years	27	1 - 5 members	4	21 - 25 members	2
1 year	0	12 - 13 years	15	6 - 10 members	38	26 - 30 members	0
2 years	0	14 - 15 years	7	11 - 15 members	35	31 - 40 members	0
3 years	2	16 - 20 years	8	16 - 20 members	14	Over 40 members	0
4 years	0	21 - 30 years	7	Largest Club	22	Smallest Club	4
5 years	1	31 - 40 years	1				
6 - 7 years	4	Over 40 years	6				
8 - 9 years	14	Oldest Club	53 years				

## REGIONAL ESTIMATES

Total Investments	\$37,646,250
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(Total # chapter clubs) x (Average Portfolio Value)

Monthly Investment	\$204,240
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(Total # Chapter Clubs) x (Aver. Monthly Dues Collected)

## Top 50 Companies Held by Puget Sound Clubs (By Number of Clubs)

Rank	Company	Ticker	Clubs	Shares	Total Value
1	Starbucks	SBUX	71	23,348	\$378,937
2	Microsoft	MSFT	53	17,630	\$502,801
3	Costco Wholesale	COST	40	6,573	\$468,356
4	Stryker	SYK	33	5,160	\$334,508
5	General Electric	GE	31	6,870	\$224,651
6	Johnson & Johnson	JNJ	31	3,643	\$244,413
7	Walgreen	WAG	25	5,293	\$184,472
8	AFLAC	AFL	21	4,662	\$310,809
9	Amgen	AMGN	19	1,724	\$72,184
10	Bed Bath & Beyond	BBBY	19	2,559	\$83,168
11	Cisco Systems	CSCO	18	4,101	\$105,150
12	Expeditors International of WA	EXPD	18	3,643	\$169,733
13	Medtronic	MDT	18	2,105	\$102,452
14	Fastenal	FAST	15	2,367	\$115,533
15	Home Depot	HD	15	2,264	\$65,202
16	Intel	INTC	15	3,793	\$84,423
17	Boeing	BA	14	1,780	\$151,039
18	Coach	COH	14	2,508	\$89,197
19	Danaher	DHR	14	2,132	\$166,324
20	Garmin	GRMN	14	1,951	\$79,799
21	Lowe's	LOW	14	1,815	\$45,715
22	PepsiCo	PEP	14	1,241	\$85,072
23	eBay	EBAY	13	1,921	\$60,109
24	Fiserv	FISV	13	2,199	\$111,159
25	Apple Computer	AAPL	12	738	\$128,375
26	Bright Horizons Family Solutions	BFAM	12	1,128	\$53,477
27	Washington Mutual	WM	12	1,579	\$19,405
28	Harley-Davidson	HOG	11	573	\$21,917
29	Infosystem	INFY	11	2,196	\$95,957
30	Procter & Gamble	PG	11	1,538	\$103,135
31	Nokia	NOK	10	2,193	\$65,956
32	PACCAR	PCAR	9	2,407	\$113,893
33	Teva Pharmaceutical Industries	TEVA	9	1,182	\$55,294
34	Factset	FDS	8	1,385	\$83,145
35	Jack Henry	JKHY	7	1,184	\$31,104
36	3M Co	MMM	7	688	\$52,907
37	Oracle	ORCL	7	1,298	\$27,063
38	Paychex	PAYX	7	1,532	\$55,733
39	Sysco	SYY	7	1,717	\$52,475
40	Unitedhealth	UNH	7	1,691	\$55,187
41	Bank of America	BAC	6	551	\$20,682
42	Berkshire Hathaway (Class B)	BRKb	6	19	\$84,683
43	Walt Disney	DIS	6	1,611	\$52,248
44	FedEx	FDX	6	303	\$29,084
45	Illinois Tool Works Inc	ITW	6	1,571	\$82,157
46	Knight Transportaion	KNX	6	1,551	\$26,345
47	Kohl's	KSS	6	385	\$18,807
48	L-3 Communications Holding	LLL	6	658	\$73,326
49	Pfizer	PFE	6	1,022	\$20,559
50	Target	TGT	6	960	\$51,005

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
3M Co	7	688	\$52,907	Carnival	1	100	\$4,017
AAR Corp	1	120	\$2,808	Caterpillar Inc	5	788	\$64,562
Abbott Laboratories	2	321	\$16,915	Cemex	4	281	\$7,770
Abercrombie & Fitch	2	550	\$40,871	CenturyTel	1	80	\$2,593
Adobe Systems	4	440	\$16,423	Ceradyne	3	157	\$6,117
Aeropostale	1	150	\$4,769	Chesapeake Energy	4	580	\$30,011
AES Corp	1	100	\$1,736	Chevron-Texaco	3	909	\$87,415
AFLAC	21	4,662	\$310,809	China Clean Energy	1	200	\$238
Agilent Technologies	1	74	\$2,236	China Telephone	3	232	\$20,018
Aires Maritime	1	100	\$549	Cisco Systems	18	4,101	\$105,150
Allied Capital	1	200	\$4,020	Citigroup	2	164	\$4,141
Amazon.com	1	100	\$7,863	Citizens Communication	2	400	\$2,136
America Movi; SA	1	600	\$34,776	Citrix Systems	1	200	\$6,550
American Capital Strat	1	309	\$9,811	Coach	14	2,508	\$89,197
American International Group	2	350	\$16,170	Coca Cola Bottling	1	30	\$1,717
Ameritrade	1	100	\$1,810	Cognizant Technology	1	150	\$4,838
Ametek	2	1,300	\$63,076	Coherent	1	300	\$8,940
Amgen	19	1,724	\$72,184	Coldwater Creek	2	300	\$1,602
Anheuser-Busch	1	400	\$19,680	Colgate-Pamolive	1	84	\$5,946
Apache	1	94	\$12,652	Columbia Banking System	1	300	\$8,124
Apple Computer	12	738	\$128,375	Comcast (Class A Special)	1	82	\$1,660
Applied Material	2	940	\$17,540	Comcast (Class A)	1	49	\$1,006
Arcelormittal	1	50	\$4,455	ConAgra Foods	1	100	\$2,356
Archer Daniels Midland	3	161	\$960	Connecticut Wtr Svc	1	100	\$2,387
AT&T	3	1,100	\$42,581	ConocoPhillips	3	228	\$19,623
Automatic Data Processing	2	202	\$8,931	Copart	1	100	\$4,087
Avery Dennison	1	300	\$14,457	Core Laboratories	1	200	\$25,056
B & G Foods	1	222	\$3,517	Corning Inc	4	2,011	\$53,714
Baidu	1	3	\$1,097	Corporate Executive	1	100	\$4,357
Bank of America	6	551	\$20,682	Costco Wholesale	40	6,573	\$468,356
Barr Pharmaceuticals	2	490	\$24,613	Coventry Health	1	100	\$4,473
BB&T	1	100	\$3,446	Covidien	1	22	\$1,027
Bed Bath & Beyond	19	2,559	\$83,168	CVS Corp	5	1,358	\$54,822
Berkshire Hathaway (Class B)	6	19	\$84,683	Cypress Semiconductor	1	100	\$2,812
Best Buy	1	34	\$1,463	Danaher	14	2,132	\$166,324
BHP Billinton LTD	3	1,304	\$105,212	Darden Restaurants	1	100	\$3,558
BJ Services	1	150	\$4,241	Davita	2	130	\$6,813
Black Rock Debt Str	1	706	\$4,031	Decker Outdoor	1	10	\$1,381
Blackstone Group	1	50	\$5,025	Dendreon	1	100	\$527
Boeing	14	1,780	\$151,039	Devon Energy Corp	2	130	\$14,742
Bolt Technologies	2	225	\$4,086	Diamond Offshore Drilling	1	400	\$50,164
BP	1	174	\$12,689	Diana Shipping	1	207	\$6,294
Bright Horizons Fam Solutions	12	1,128	\$53,477	Diebold	3	264	\$10,360
Bristol-Myers Squibb	1	100	\$2,197	Diodes Inc	1	150	\$4,056
BUCYTUS INTL	1	47	\$5,919	Direct TV	1	250	\$6,160
Buffalo Small Cap Fund	1	121	\$2,698	Dish Network	1	40	\$1,194
Cameron International	1	600	\$29,538	Dodge & Cox international	1	151	\$6,673
Cannon	3	825	\$41,225	Donaldson	1	550	\$23,947
Caparis	1	100	\$483	Dynegy	1	500	\$4,310
Cardinal Health	1	900	\$46,863	Eagle Materials	1	150	\$5,442
Carlisle	1	62	\$1,805	East West Bancorp	1	100	\$1,424

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
eBay	13	1,921	\$60,109	Ingersoll Rand	1	70	\$3,107
EMC	1	100	\$1,540	Intel	15	3,793	\$84,423
EnSCO International	1	40	\$2,549	Interntl Game Technology	2	120	\$4,169
Expeditors Int of Washington	18	3,643	\$169,733	International Speedway	1	150	\$6,363
Express Scripts	1	200	\$14,004	Intuit	2	400	\$10,788
Exxon Mobil	2	120	\$11,168	Inverness Med Innovation	1	100	\$3,700
Factset	8	1,385	\$83,145	iShares Cohen & Steers Rlty	1	100	\$8,558
Fastenal	15	2,367	\$115,533	iShares MSCI EAFE Index	2	116	\$8,794
FBR Small Cap Financial	1	278	\$4,370	iShares Pacific ex Japan	1	49	\$7,159
FedEx	6	303	\$29,084	ITT Educational Services	1	500	\$38,330
Financial Select spdr energy	1	54	\$1,425	J 2 Global Communications	1	1,700	\$36,380
First Financial Northwest	1	2,000	\$20,040	J.P. Morgan Chase	2	360	\$17,154
Fiserv	13	2,199	\$111,159	Jack Henry	7	1,184	\$31,104
Flextronics International	2	318	\$3,304	Johnson & Johnson	31	3,643	\$244,413
Flir System	2	500	\$17,165	Johnson Controls	2	1,050	\$37,023
FLOTEK	1	200	\$3,744	Jones Lang LaSalle	1	50	\$3,881
Flow International	1	500	\$5,015	Jones Soda	1	163	\$528
Ford Motor	3	500	\$4,130	Kadant Inc	1	600	\$15,648
Forward Air	1	75	\$2,557	Kansas City Southern	1	32	\$1,443
Freddie Mac	1	100	\$2,491	Kellogg	1	26	\$1,347
Freeport McMoran	1	400	\$45,500	Kimberly-Clark	2	33	\$2,112
Frontier Financial Corp	1	200	\$3,200	Kimco Realty	1	53	\$2,102
Fuel Tek	1	100	\$1,872	Kinetic Concepts	1	800	\$31,728
Gamestop CP	2	95	\$5,229	Knight Transportaion	6	1,551	\$26,345
Garmin	14	1,951	\$79,799	Kohl's	6	385	\$18,807
Genentech	4	405	\$27,621	Korn/Ferry Int'l	1	100	\$1,866
General Dynamics	2	475	\$42,950	Kroger	2	125	\$3,406
General Electric	31	6,870	\$224,651	L-3 Communications	6	658	\$73,326
Gilead Sciences	3	900	\$46,584	Laboratory Corp of A	1	80	\$6,050
Goldman Sachs	1	300	\$4,884	Landec Corp	1	100	\$811
Goodrich	1	300	\$20,445	Lincare Holdings	2	800	\$19,472
Google	5	75	\$43,072	Linear Technology	2	235	\$8,216
Groupo Aeroportuario	1	100	\$4,087	LJ International	1	100	\$261
Halliburton	1	150	\$6,887	Lowe's	14	1,815	\$45,715
Hansen Natural	1	100	\$3,539	Manitowoc	3	1,200	\$45,384
Harley-Davidson	11	573	\$21,917	Marathon oil	1	100	\$4,557
Harris Corp	1	100	\$5,403	Mkt Vectors Agribusiness	1	100	\$5,875
HCC Insutance Holdings	1	100	\$2,468	Marsh & McLennan Cos Inc	1	950	\$26,211
Health Management Assoc	1	300	\$2,139	Martha Stewart Living	1	100	\$791
Healthextras	2	325	\$9,172	Matthews International	1	300	\$14,832
Helix Energy	1	300	\$10,365	McDonald's	2	76	\$4,506
Hewlett-Packard	1	66	\$3,059	MDU Resources Group	3	422	\$12,169
Hibbett Sporting Goods	2	272	\$4,967	Mechanical Solutions	1	1,000	\$370
Hologic	2	200	\$5,838	Medtronic	18	2,105	\$102,452
Home Depot	15	2,264	\$65,202	Merck	1	400	\$15,216
Honda Motor	1	500	\$15,875	Meredith Corp	1	75	\$2,431
Honeywell International	2	144	\$8,573	Microsoft	53	17,630	\$502,801
IIVI	2	300	\$11,142	Middleby Corp	1	100	\$6,275
Illinois Tool Works Inc	6	1,571	\$82,157	Millipore Corp	1	63	\$4,416
Imperial Oil	1	100	\$5,854	Moog (Class A)	1	50	\$2,156
Infosystem	11	2,196	\$95,957	Morgan Stanley Dean	2	255	\$12,392

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
Mosaic	1	100	\$12,251	Ryanair Holdings	3	240	\$6,506
Motorola	2	161	\$1,603	S&P Midcap ETF	1	25	\$3,809
MSC Industrial	1	100	\$4,876	Salesforce.com	1	20	\$1,335
Mylan Laboratories	1	90	\$1,185	SAP	3	175	\$8,790
Nastech Pharnaceu	1	100	\$137	Sasol Ltd	1	45	\$2,549
National Oilwell Varco	1	200	\$13,690	ScanSource	1	1,000	\$24,970
Natural Gas Services	1	100	\$2,414	Schlumberger	2	158	\$15,887
Navteq Corp	1	100	\$7,421	Schnitzer Steel	1	100	\$8,800
Neogen	1	214	\$5,378	Sciele Pharm	3	2,300	\$44,321
Netflix	1	300	\$9,594	Seattle Genetics	1	100	\$1,016
Newalta Income Fund	1	80	\$1,608	Sherwin Williams	1	100	\$5,532
Nike (Class B)	1	50	\$3,340	Siemens	1	51	\$6,003
Noble	2	1,035	\$58,250	Sirius Satellite Radio	2	200	\$514
Nokia	10	2,193	\$65,956	Smith International	3	1,195	\$91,429
Nordstrom	3	650	\$22,919	Smuckers	1	50	\$2,494
Novartis	1	100	\$5,033	Sonosite	1	100	\$3,189
Nucor	3	450	\$33,975	Southern Copper	2	60	\$6,831
Oil ServiceHolders	1	100	\$19,628	Southwest Airlines	5	436	\$5,778
Olin Corp	1	50	\$1,009	St. Jude Medical	2	377	\$16,505
Omnicom Group	1	212	\$10,130	Stanley Works	1	100	\$4,824
optionsExpress	1	1,700	\$36,499	Staoill ASA	1	100	\$3,617
Oracle	7	1,298	\$27,063	Staples	4	1,863	\$40,429
O'Reilly Automotive	2	250	\$7,218	Starbucks	71	23,348	\$378,937
Oshkosh Truck	2	1,103	\$44,782	State Street	2	235	\$16,917
PACCAR	9	2,407	\$113,893	Stericycle	2	110	\$5,872
Panera Bread	1	25	\$1,307	Stryker	33	5,160	\$334,508
Paychex	7	1,532	\$55,733	Sun Hydraulics	1	125	\$3,773
Peabody Energy	4	400	\$24,477	Sunpower	1	100	\$8,727
Penn National Gaming	1	50	\$2,136	Sunrise Senior Living	3	300	\$6,435
PepsiCo	14	1,241	\$85,072	Suntech Solar	1	100	\$4,473
PetMed Express	2	2,700	\$30,294	Synovus Financial	2	338	\$3,998
Petro Canada	1	70	\$3,508	Sysco	7	1,717	\$52,475
Pfizer	6	1,022	\$20,559	T. Rowe Price Group	1	100	\$5,856
Philadelphia Cons Holding	2	1,200	\$44,256	Target	6	960	\$51,005
Pinnacle West	1	50	\$1,697	Techne	1	500	\$36,260
Plantronics	2	500	\$12,455	Teleflex	1	169	\$9,327
Portfolio Recovery Assoc.	2	299	\$13,159	Teva Pharmaceutical Industries	9	1,182	\$55,294
Potash	2	94	\$17,313	Texas Instruments	3	959	\$27,964
Powershares Food & Beverage	1	100	\$1,674	Textron	2	119	\$7,260
Powershares QQQ	1	100	\$4,721	Tiffany	2	70	\$3,048
Precision Castparts	1	25	\$2,939	Timberland Bancorp	1	130	\$1,451
Procter & Gamble	11	1,538	\$103,135	Titanium Metals	1	200	\$3,048
Public Storage	1	32	\$2,902	Total S A Sponsored ADR	2	200	\$16,800
Qualcom	5	930	\$40,167	Total Systems Services	2	161	\$3,832
Quality Systems	2	176	\$5,653	Toyota Mtr Corp	3	230	\$23,345
Quest Diagnostics	1	200	\$10,036	Transocean	2	523	\$77,122
Rae Systems	1	200	\$316	Trex	1	200	\$1,820
Raven Industries	1	91	\$2,794	Trinity Industries	1	1,000	\$30,400
ResMed	1	100	\$4,312	Trueblue	1	300	\$3,819
RS Natural Resources	1	166	\$6,687	Tyco International	1	22	\$1,029
RTI Int Metals	1	25	\$1,030	Ulltra Petroleum	1	880	\$73,102

## Top Holdings of Puget Sound Clubs

Company	Clubs	Shares	Value	Company	Clubs	Shares	Value
Ultra Clean Holdings	1	100	\$1,069	Waste Management	1	52	\$1,876
United Natural Foods	2	120	\$2,376	WEBS Singapore	1	200	\$2,714
United Parcel Service	5	211	\$15,279	Weight Watchers International	1	80	\$3,669
United Technologies	2	203	\$14,676	Wellpoint Inc	2	1,050	\$52,238
Unitedhealth	7	1,691	\$55,187	Wells Fargo	1	50	\$1,488
Vaalco Energy	2	600	\$3,888	Western Union	3	225	\$5,175
Vang. Total International Stock	2	871	\$16,709	Whirlpool	1	200	\$14,556
Vanguard Emerging Markets	2	144	\$14,659	Whole Foods Market	6	319	\$10,400
Varian Medical Systems	2	293	\$13,736	Wipro Ltd ADS	1	100	\$1,300
VCA Antech Inc	2	320	\$10,358	Wolverine World Wide	1	75	\$2,156
Verizon Communications	2	75	\$2,886	Wrigley WR Jr	1	95	\$7,235
Vimpel	1	100	\$3,016	WYNN Resorts	1	25	\$2,634
Vodafone Group	1	109	\$3,451	XTO Energy	4	384	\$23,754
Walgreen	25	5,293	\$184,472	Yahoo!	1	100	\$2,741
Wal-Mart Stores	2	109	\$6,298	Yum! Brands	2	263	\$10,690
Walt Disney	6	1,611	\$52,248	Zebra Technologies	5	459	\$16,877
Washington Federal	1	551	\$13,119	Zimmer Holdings	1	300	\$22,248
Washington Mutual	12	1,579	\$19,405	ZUMIEZ	3	143	\$2,996
Waste Connection	2	272	\$8,723				



## Puget Sound Investor Fair 2008

Nobody cares more about your money and your financial future than you do. Nobody. Not your boss; not your brother; and certainly not your broker.

No, it's up to you to make sure you have enough money to see you through a comfortable retirement. But you are busy. Investment education takes time. And money.

If only someone would consolidate the information you need into an affordable, accessible, understandable two day education seminar.

Someone did.

On Friday and Saturday, November 21 & 22, the Puget Sound Chapter of BetterInvesting will hold its 2008 annual Investors Fair at the Meydenbauer Center, 11100 NE 6th Street, Bellevue, WA. This fair is organized by the local chapter of BetterInvesting, a non-profit organization which educates non-professionals about investing their hard-earned money. The fair will have nine break-out sessions and each will have five class alternatives to choose from. Over half of the classes will be new to the Puget Sound Chapter's Investors Fair.

The classes benefit existing and new members by focusing on mutual fund selection, stock selection, and stock portfolio management. They generally last 50 minutes and include question-and-answer periods. Some classes run in sequel. Also, representatives from corporate shareholder services departments will give presentations. All registered attendees will receive a thick book containing the presentation material. A computer lab with hands-on demonstrations on how to run software used for stock selection and portfolio management will be open for attendees. Individual investors of all ages would greatly benefit from attending this event.

For more information visit [www.betterinvesting.org/puget](http://www.betterinvesting.org/puget) or write to [contact@puget.betterinvesting.net](mailto:contact@puget.betterinvesting.net).

	Puget Sound Chapter Investor Fair	November 21-22, 2008	Meydenbauer Center Bellevue WA
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## Club Portfolio Winners

<b>1st Prize</b>	<b>Partners in Profit - Gig Harbor</b>	<b>Winning clubs were awarded paid admissions to the 2008 Puget Sound Investor Fair.</b>
<b>2nd Prize</b>	<b>FTL - Bellingham</b>	
<b>3rd Prize</b>	<b>MS2 (Money Smart-Midlife Savers) - Mill Creek</b>	

*BetterInvesting is a non-profit organization providing investment information, education and support that empowers members to become successful, lifetime investors. Founded in 1951, BetterInvesting has provided investment education to more than five million people and is a charter member of the World Federation of Investors, which provides investment education in over 17 countries worldwide. For information visit [www.betterinvesting.org](http://www.betterinvesting.org) or call 877-ASK-NAIC (877-275-6242).*

SURVEY HISTORY AND SUMMARY										
	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999
Clubs Contacted	366	431	736	676	874	1045	1202	1308	1342	1320
Responses	93	113	136	157	172	249	260	352	408	452
% Reporting	25.4%	26.2%	18.5%	23.2%	19.7%	23.8%	21.6%	26.9%	30.4%	34.2%

- ### NOTES
- Companies and data reported in this survey are for educational information only and no recommendation for purchase is implied or intended.
  - The Holdings listed are those valued in excess of \$1000, or more than 100 shares.
  - Values were calculated using the closing price/share for April 30, 2008 as reported by Yahoo.
  - All information provided by club contacts is kept confidential.

This survey report was prepared by Puget Sound Chapter Board Members Diane Ellison, Jim Thomas, Shirley Ganse and Gary Ordway



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**BETTERINVESTING**  
Puget Sound Chapter  
P.O. Box 66470  
Seattle, WA. 98166

**BETTERINVESTING - PUGET SOUND CHAPTER**



**2008**

**ANNUAL CLUB SURVEY**

**Thank you to the 93 Club Contacts who participated in this year's survey!**