


2024  
Research Triangle  
Chapter Survey

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# Survey Part I: the Chapter

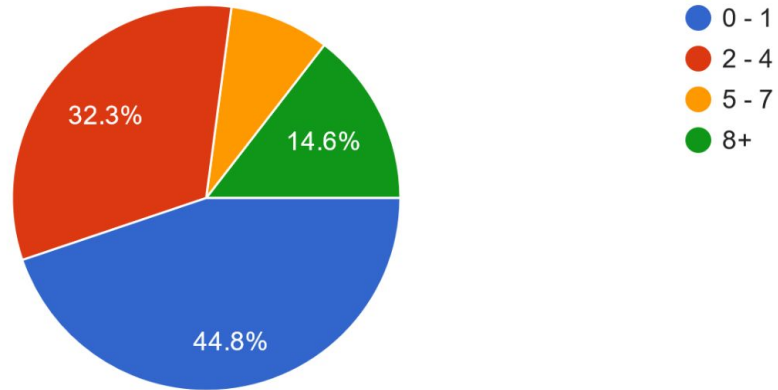
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- 96 respondents
- Meeting Attendance
- Presentation Topic Preferences
- Ways the Chapter Can Improve
- Chapter Involvement

# Meeting Attendance

Since we restarted in-person meetings in May, 2022, approximately how many chapter meetings did you attend, either virtually or in-person?

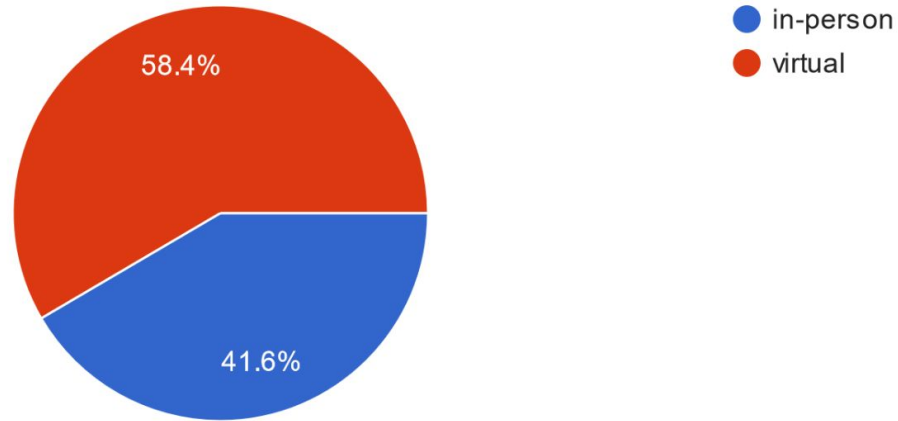
96 responses



# Meeting Attendance

Was the majority of your attendance in-person or virtual?

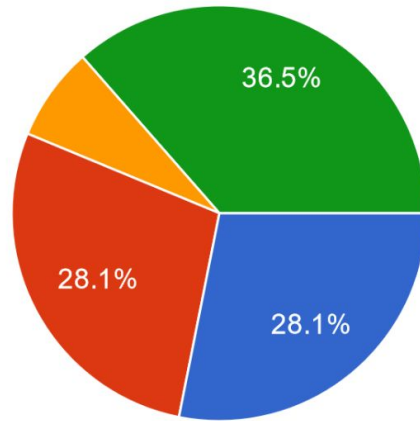
77 responses



# Meeting Attendance

Do you prefer meeting in person or virtually?

96 responses



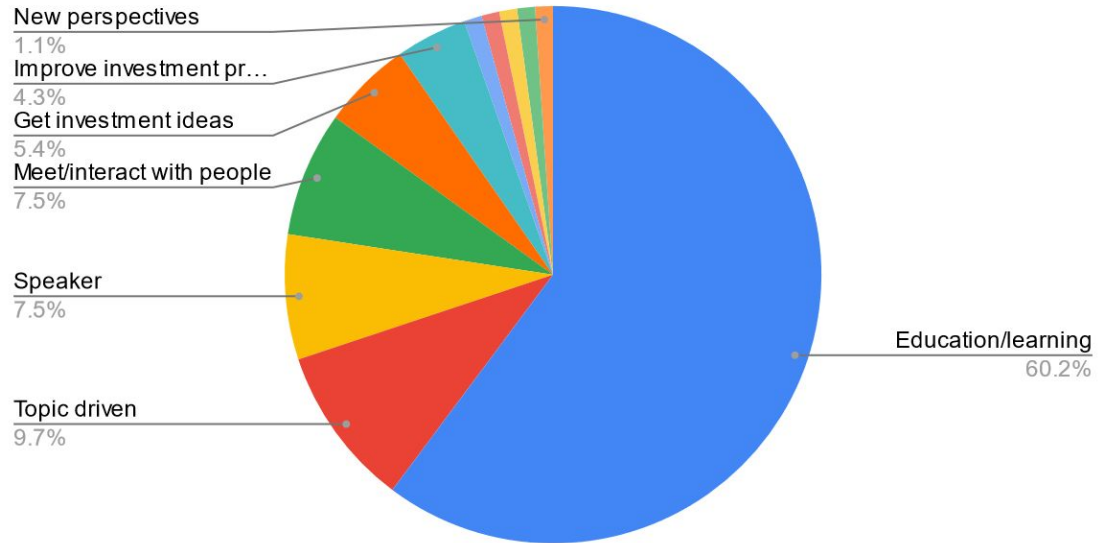
- in person
- virtually
- no preference
- it depends (on the speaker, weather, personal availability, etc.)

# Reasons For And Obstacles To Attending Meetings

- Education/learning
- Topic driven
- Speaker
- Meet/interact with people
- Get investment ideas
- Improve investment practice
- To make sure we don't outlive our money
- My local chapter is not active enough
- Get handouts
- Varied reasons
- New perspectives

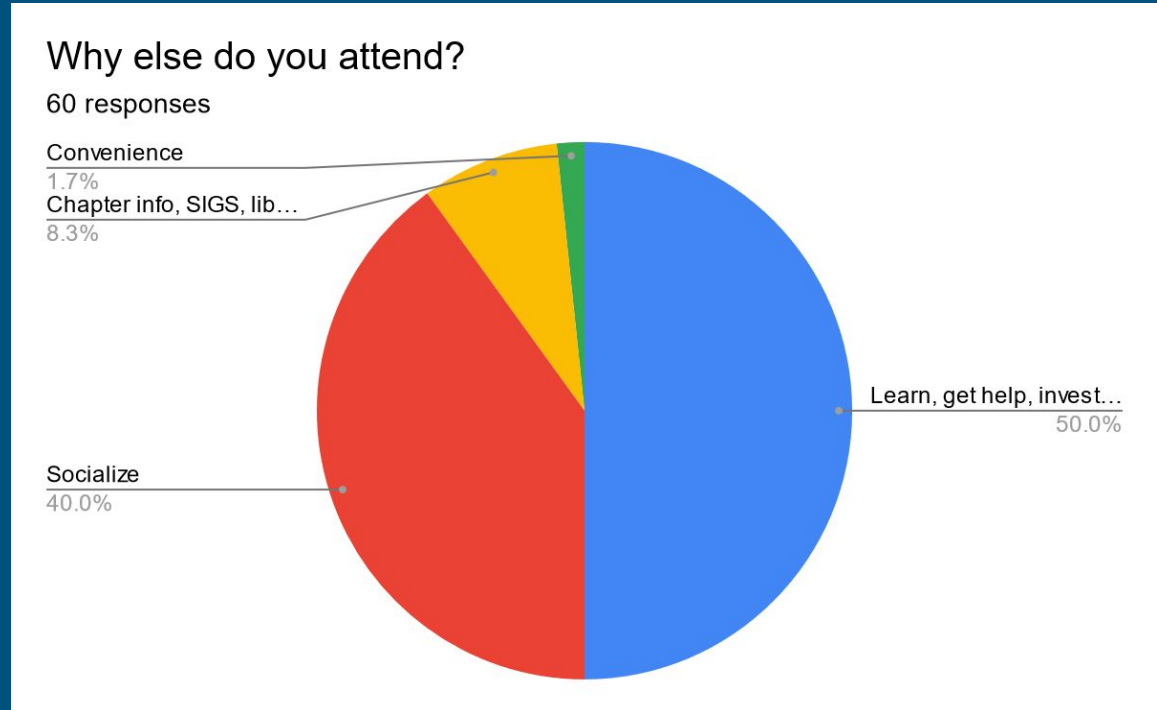
## What is the main reason that you attend meetings?

93 responses



# Reasons For And Obstacles To Attending Meetings

- Learn, get help, investment tips
- Socialize, meet people
- Get chapter information, SIGs, library
- Convenience



# Reasons For And Obstacles To Attending Meetings

What is the main obstacle preventing you from attending chapter meetings?

89 responses

Not enough notice

1.1%

Health concerns

6.7%

Disinterest in topic, quality

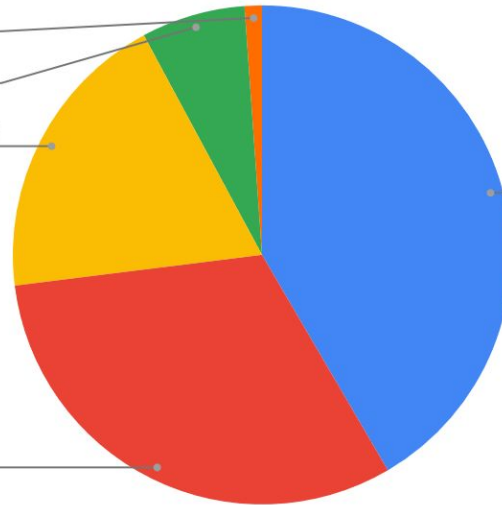
19.1%

Scheduling, priorities

31.5%

Location, weather

41.6%

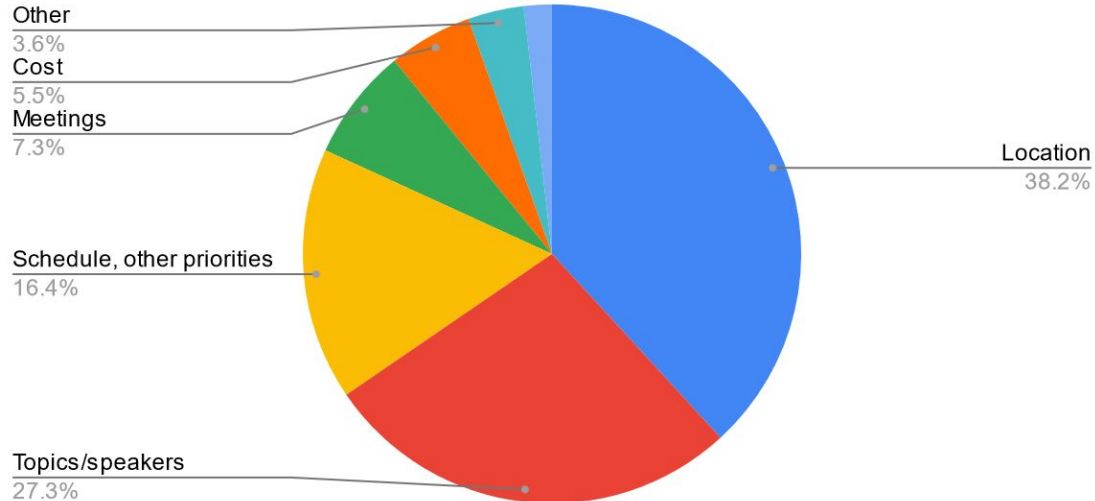




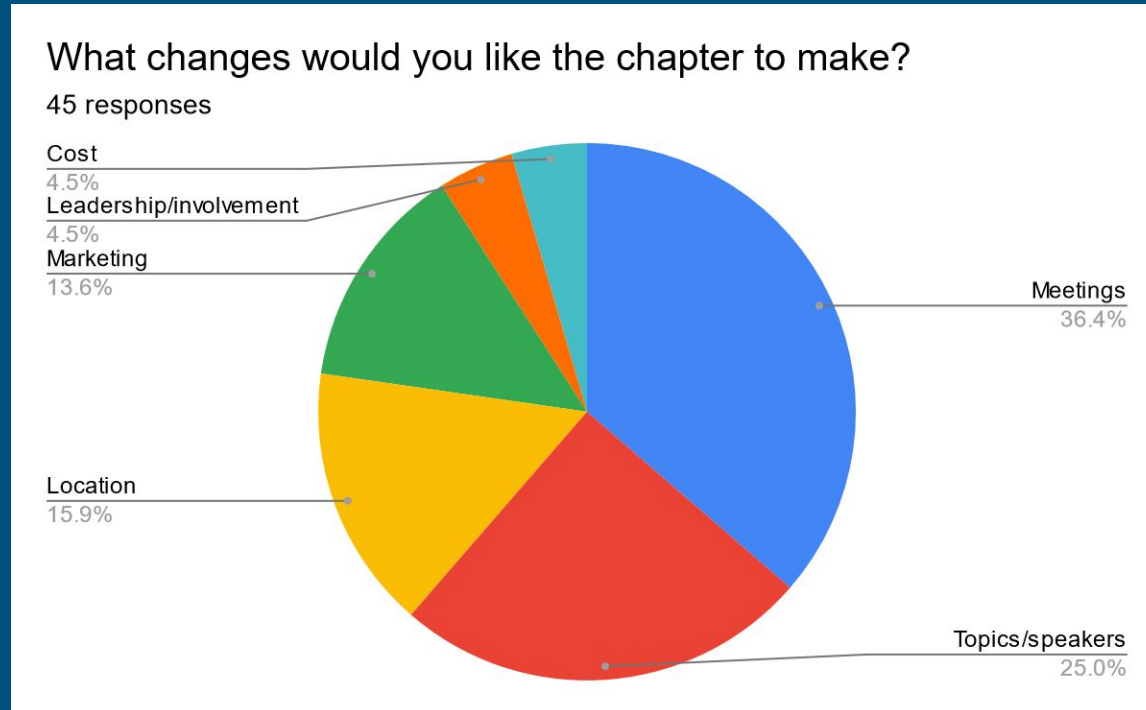
# Reasons For And Obstacles To Attending Meetings

What else keeps you from attending? What could the chapter do to increase your attendance?

55 responses

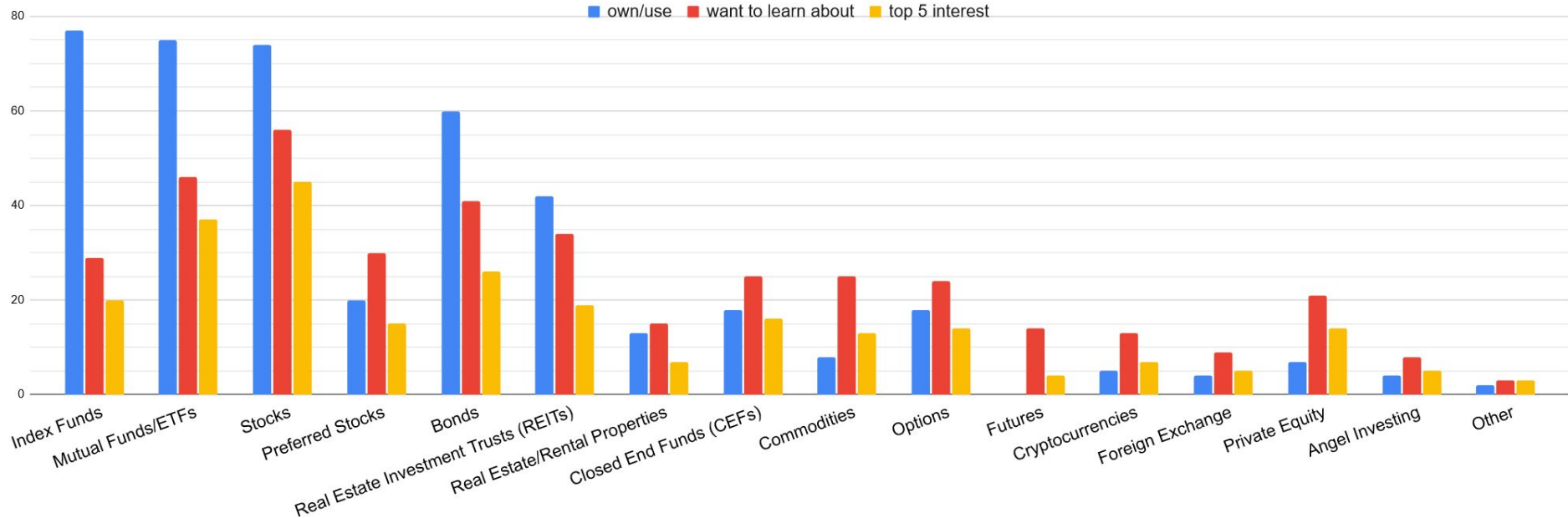


# Reasons For And Obstacles To Attending Meetings



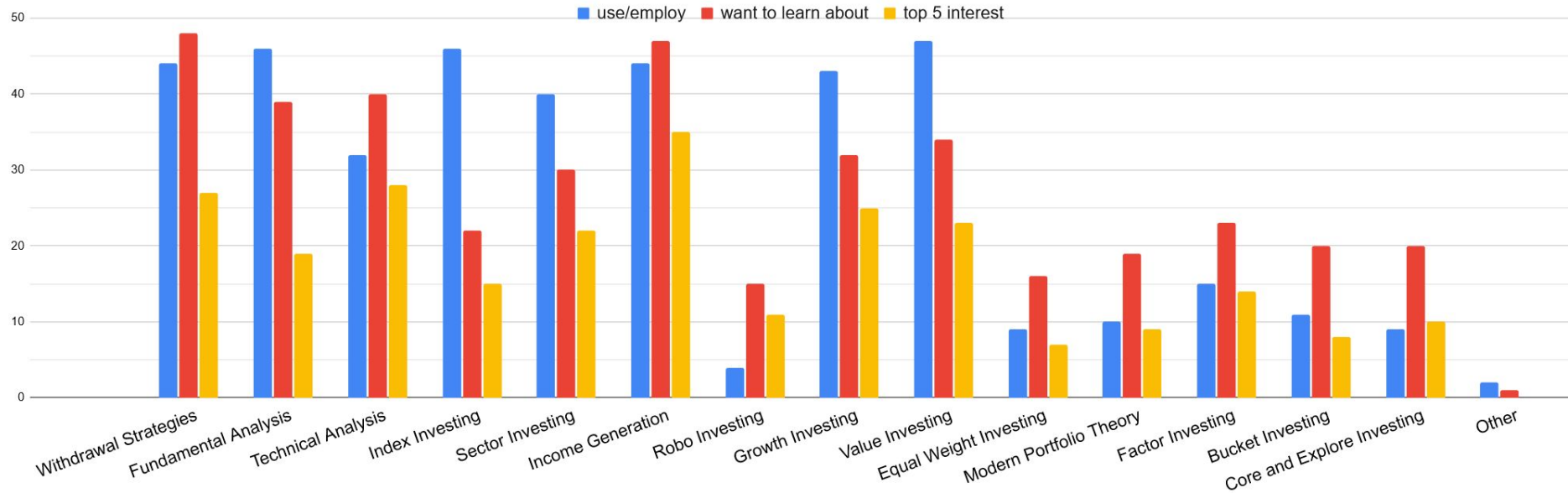
# Chapter Presentation Topics

## Investment Vehicles



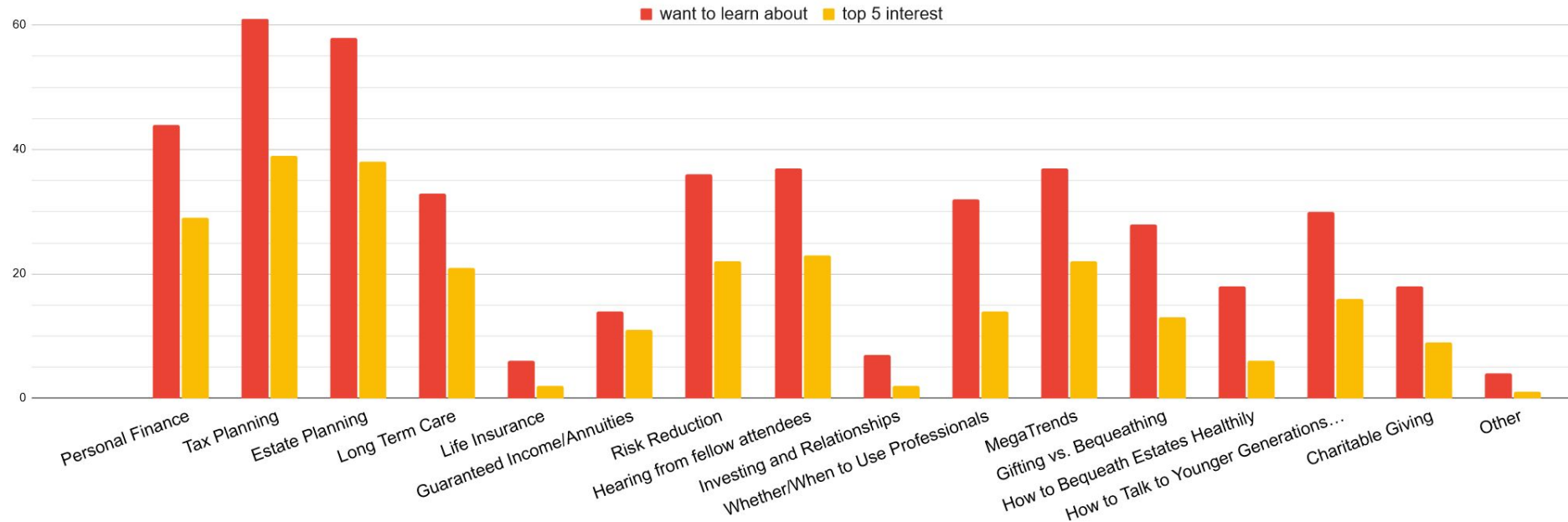
# Chapter Presentation Topics

## Investment Strategies



# Chapter Presentation Topics

## Other Presentation Topics

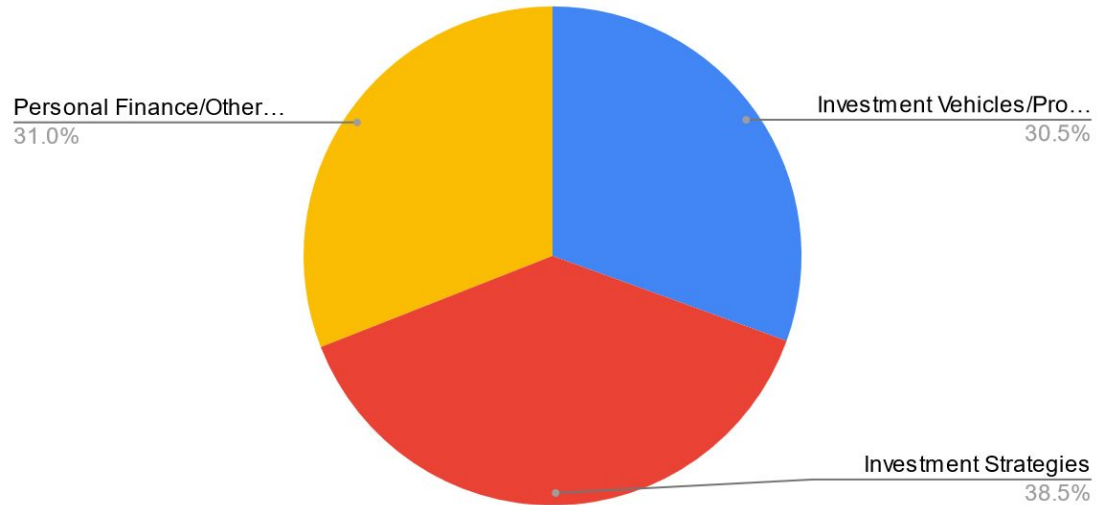


# Chapter Presentation Topics

- Investment Vehicles/Products
- Investment Strategies
- Personal Finance/Other Topics

What percentage of chapter meetings should be devoted to the following?

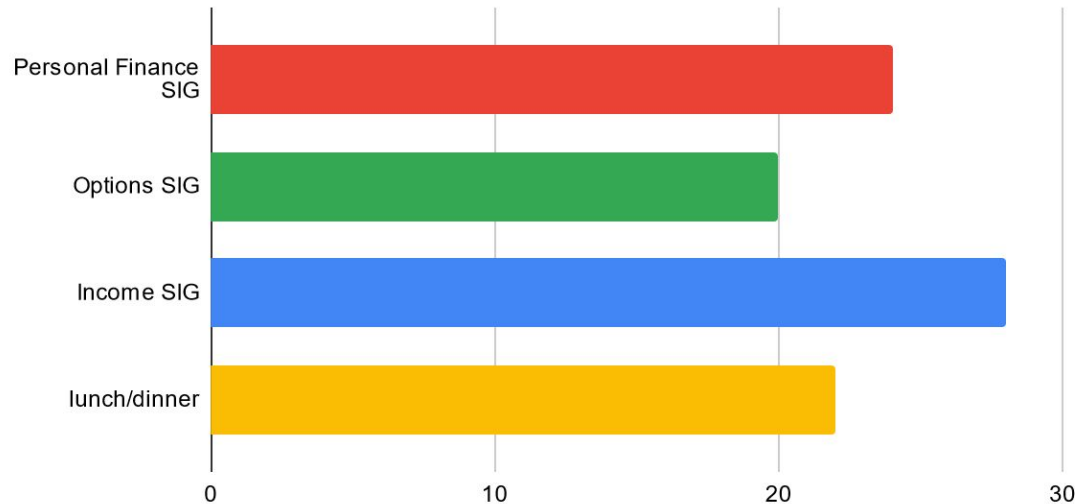
82 responses



# Chapter Involvement

Are you interested in attending or creating Special Interest Groups or other get-togethers?

63 responses



# Chapter Involvement

What is the most important thing the chapter can improve upon?

35 responses

More SIGs (2)

5.7%

Topics (4)

11.4%

Miscellaneous (4)

11.4%

Marketing/publicity (5)

14.3%

Speakers (8)

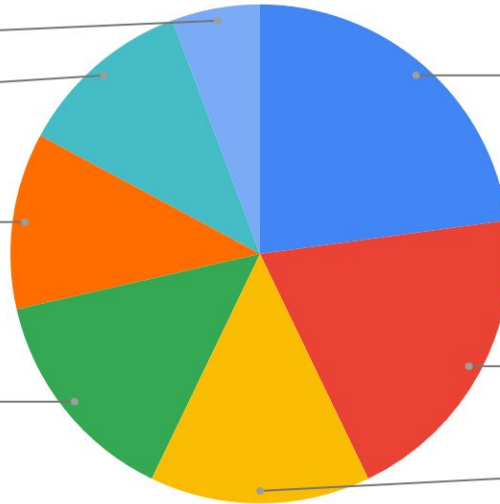
22.9%

Location (7)

20.0%

Interactions (5)

14.3%





# Chapter Involvement

What else can the chapter do better?

16 responses

Cost (2)

12.5%

Better speakers (2)

12.5%

Other (3)

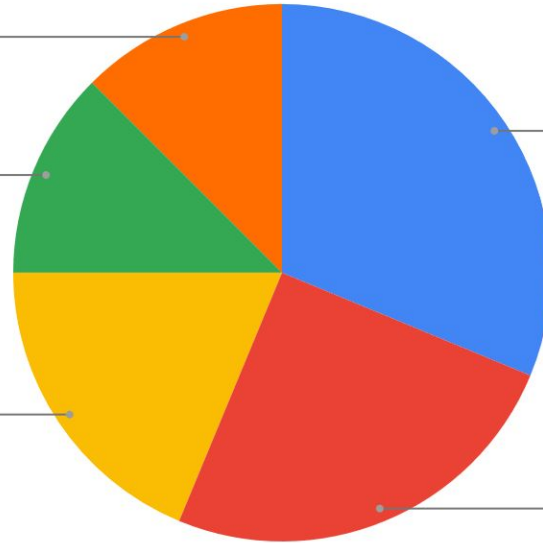
18.8%

Be more interactive (5)

31.3%

Marketing/publicity (4)

25.0%



# Chapter Involvement

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Many thanks to the respondents who said they would be willing to help:

- Open to several possibilities (5)
- Meeting setup/breakdown (4)
- Marketing (2)
- Secretary (1)

# Big Takeaways

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- Evenly split interest in virtual vs. in-person meetings
- Main reasons to attend meetings:
  - Education
  - Social, meeting people
- Main reasons not to attend meetings:
  - Meeting location
  - Schedule (conflicts), priorities
  - Disinterest in Topic, quality of speakers

# Big Takeaways

- 39% - 31% - 30% split for Investment Strategies, Investment Vehicles, and Other Topics

Top 10 presentation topics		
Investment Vehicles	Investment Strategies	Other Topics
<ul style="list-style-type: none"><li>• Stocks (56)</li><li>• Mutual Funds/ETFs (46)</li><li>• Bonds (41)</li><li>• REITs (34)</li></ul>	<ul style="list-style-type: none"><li>• Withdrawal Strategies (48)</li><li>• Income Generation (47)</li><li>• Technical Analysis (40)</li><li>• Fundamental Analysis (39)</li><li>• Value Investing (34)</li></ul>	<ul style="list-style-type: none"><li>• Tax Planning (39)</li><li>• Estate Planning (38)</li></ul>

- Healthy interest (20+) in a new Personal Finance SIG and in lunch groups

# What We Plan to Do

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- Align presentation topics/speakers with the topics of highest interest
- Look for a more central meeting location
  - Your help finding one would be appreciated. Here is what we are looking for:
    - Venue located west of Raleigh on/near I-40
    - Ability to reserve venue consistently (second Saturday morning of each month)
    - A reasonable cancellation/rescheduling policy
    - Capacity of 80+ (for us to grow into); 40 minimum for now
    - Reliable WiFi
    - Inexpensive (we currently pay ~\$100/meeting)
- Increase marketing efforts
- Incorporate volunteers into leadership
- Initiate new Personal Finance SIG... leader volunteer(s) needed
- Initiate new lunch groups ... leader volunteer(s) needed