

Welcome to the Ottawa Share Club

The Ottawa Share Club was founded in 1996. The club's direction is determined by a volunteer executive committee. Our club is not-for-profit. Our motto is "Share Knowledge, not Capital" and is **not** an investment club where member funds are pooled and invested. Our strength is in our membership. Our members have a diversity of *knowledge and experience*. It is the contributions of the membership that enables our club to satisfy our key objective to share financial knowledge on a variety of topics between members.

The club holds monthly meetings which are usually held on the second Tuesday of each month. Meetings offer a mix of member and outside specialist presentations as well as group discussions. Our schedule is published here: <https://ottawashareclub.ca/ottawa-share-club-meeting-calendar/>

Our meetings are held mostly virtually using Cisco Webex (free connection client is available for download) since the COVID-19 pandemic, but we also try to have a few in person meeting a year. To find out more about upcoming meetings please email the club email address: ottawashareclub@gmail.com and ask to be added to the club's mailing list.

Executive meetings are held monthly the week following the monthly meeting. Any club member is welcome to participate and/or join the executive team. If you are interested in attending, please contact the club email ottawashareclub@gmail.com.

Membership is open to all and while donations are accepted to defray our costs the club is free. Any funds donated will be used to pay for video conferencing, in-person meeting expenses, this Club website and other miscellaneous expenses directly related to the Club's mission. **The suggested donation is \$25 for the season.** The Club does not offer tax receipts. Please donate if you can! The preferred method is to send an e-transfer to ottawashareclub@gmail.com where it will be processed by Bradley, the Ottawa Share Club treasurer.

Some of the many topics we have covered over the years include:

- Portfolio construction
- How to use various sheltered accounts such as RRSP, RESP, TFSA, RDSP, etc.
- The possible pitfalls in selecting a financial advisor
- Strategies to minimize tax on retirement
- Investment policy statements
- Preferred shares
- Value investing
- Investing in secular (thematic) trends
- Investing in real estate
- Investing in gold
- Bad investment products, how to recognize them
- Retirement income planning

- Insurance needs analysis
- Budgets
- Best credit cards to use and the cards to avoid
- Preparation of a will
- Technical analysis; the MACD, Candlestick charting and other technical analysis tools
- Investing in “arm’s length mortgages”. Is this for you and how do you do it?
- DRIPs = dividend reinvestment programs
- Annuities (What are they and how are they best used?)

Many of our presentations have been provided by club members. These presentations have been excellent examples of sharing experiences and have given members the opportunity to further research topics.

We have had many presenters from outside the club including but not limited to: Almost all of the major Canadian Banks; a credit specialist from Bank of America – MBNA; a professor from Algonquin College; representatives from the Royal Canadian Mint; certified financial planners (CFPs), foreign exchange (FX) specialists from Montreal; the President of a major Canadian fund company; a Vice President of Horizons ETFs; a Certified Public Accountant from BDO, popular financial bloggers in Canada (Mark Seed, DGI&R, Mike Heroux, Nelson Smith), and the list goes on and on.

We thank all these presenters who have given us their time and shared valuable information with our club. Past presentations can be found here: <https://ottawashareclub.ca/osc-share-club-member-pages/>. Please register on the Website for a free account. All account requests are acknowledged with an email and will be approved by our volunteer Webmaster, usually within a few days, and you will receive another email inviting you to log in.

The Ottawa Share Club members run two crowd-sourced fantasy portfolios (growth and income) to promote fun and information exchange. More about them can be found here: <https://ottawashareclub.ca/ottawa-share-club-fantasy-portfolios/>

In summary, **welcome! To be added to the club’s email list, please email: ottawashareclub@gmail.com** and remember to visit our **Web Page at <https://ottawashareclub.ca/>**

April 2026