

CONTRACT kapital

Investment Clubs Administrators Training Curriculum

ABOUT INVESTMENT CLUBS

An investment club is a group of people who come together with the intention of saving money to invest. In so doing, they generate returns for their members and help them become financially free. On the other hand, investment clubs also enhance their members' knowledge through information sessions facilitated by experts, and they enhance members' networks. Further, they also help members' social affairs by providing companionship in times of happiness, such as weddings, job appointments or graduations, and in times of sorrow, such as during divorce, sickness or death.

THE NEED FOR INVESTMENT CLUB ADMINISTRATORS

However, investment club members are very busy, and may forget activities, duties, roles, or to attend meetings or pay their dues. It is the role of the administrator, to make this happen. Consequently, it is advisable to employ an administrator, a non-member, an employee, a third party, purely working for the club as the chief operations officer who knows everything, the laws, the policies, the membership, the contributions, the entrants and exits, everything, heads the management committee, and or all staff of the investment club, and is in charge of operations of the club.

INVESTMENT CLUBS SECRETARY TRAINING CURRICULUM

Given the responsibility of the administrator, the training of the investment club administrator focuses on the following:

- ¥ *Minute taking.*
- ¥ *Sending communication is sent to all members, stakeholders, and regulators, including lawyers, auditors, accountants, and banks, such as meeting dates and venues, agenda for meetings, minutes of meetings, thank you notes to visitors and trainers, and partners, etc.*
- ¥ *Preparation of reports, including annual reports, financials, audited reports, portfolio analysis and reporting.*
- ¥ *Filling and updating club documents including club policies, by laws, legal registrations, and related documents like membership forms, loan forms, investment forms, etc.*
- ¥ *Registering and updating member details, including next-of-kins, beneficiaries, contributions, dividends, loans, portfolio, etc.*
- ¥ *Ensuring regulatory compliance such as taxes, legal, return filings, member tax returns and filings, licenses, etc.*
- ¥ *Carry out accounting, banking, reconciliation, and reporting, helped by the club advisors such as auditors, accountants and lawyers.*
- ¥ *Contacting strategic partners, including associations, stock brokers, custodial service providers, etc.*

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Uganda House, Plot 8/10, Kampala Road 8th Floor. P.O. Box 2415 Kampala Uganda.

Tel: +256 41 4696004 E: invest@contractkapital.com W: www.contractkapital.com

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