Wealth Society Mission Statement
To give sophisticated investors exclusive access to all of Investing Daily’s top analysts and their proprietary and proven investing systems through private communication channels and intimate gatherings.
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Welcome to the Wealth Society (WESO)!

You’ve now joined an exclusive group of self-directed investors who grow and protect their wealth with our in-depth research and actionable advice.

Your membership includes more than a dozen services and benefits valued at more than $29,000. You get:

- 13 equity and options trading advisories
- Access to any of our new advisory services
- Free VIP pass to our annual Wealth Summit
- Monthly online chat sessions with our analysts
- Private Wealth Society website and Confidential daily email update
- Direct access to our analysts and leadership team
- Priority member services support

If you have any questions, please do not hesitate to contact our member services team at:

Service@IDWealthSociety.com
(800) 858-9992

For questions related to our advice, you may contact our Director of Portfolio Strategy, Jim Pearce. He’ll give you an answer or point you to the analyst who can help you best. The best way to reach Jim is by posting a comment to the Stock Talk section under the Resources menu of the Wealth Society website. Or you may contact him at:

jpearce@InvestingDaily.com
(703) 905-4571

Or, contact me directly with any suggestions about how to improve your Wealth Society membership experience:

pash@InvestingDaily.com
(703) 905-4657

On behalf of our entire team, we look forward to meeting you at an upcoming Wealth Society Summit and serving your investing needs for many years to come.

To your wealth,

Phil Ash, President
Investing Daily Wealth Society
1. Included Publications

Below is a list of the Investing Daily publications you now have access to, with links to their respective microsites. Please see these sites for more information about each service.

**Aggressive Trader** (AT)
Stephen Leeb, Chief Investment Strategist

**Brain Trust Profits** (BRAIN)
Stephen Leeb, Chief Investment Strategist

**Breakthrough Tech Profits** (BTP)
Jim Pearce, Chief Investment Strategist

**The Complete Investor** (TCI)
Stephen Leeb, Chief Investment Strategist

**The Energy Strategist** (ES)
Robert Rapier, Chief Investment Strategist

**Income Millionaire** (IM)
Igor Greenwald, Chief Investment Strategist

**Options for Income** (OFI)
Jim Fink, Chief Investment Strategist

**Personal Finance** (PF)
Jim Pearce, Chief Investment Strategist

**Profit Catalyst Alert** (PCA)
Linda McDonough, Chief Investment Strategist

**Real World Investing** (RWI)
Stephen Leeb, Chief Investment Strategist

**Systematic Wealth** (SW)
Jim Pearce, Chief Investment Strategist

**Utility Forecaster** (UF)
Ari Charney, Chief Investment Strategist

**Velocity Trader** (VT)
Jim Fink, Chief Investment Strategist

2. Receiving Your Content

There are many methods we'll use to deliver all of the content you now have access to in the most clear and efficient manner.

**Electronic Issues**

This is the fastest way to receive the new editorial issues of our publications. New editorial issues are posted on each publication’s microsite and, for your convenience, we will send you an email notifying you when new issues become available online. Current issues can be easily accessed on
each microsite’s home page by clicking on the large black “Current Issue” bar. PDF and HTML versions of the current issue, as well as extensive issue archives, can also be found on each microsite under the “Issue Archives” tab (see image at right for example of the Personal Finance microsite).

**Print Issues**

The majority of our publications are only available online, but Personal Finance and Utility Forecaster issues are printed and mailed to you. The printed issues are identical to the online versions, and should arrive through the U.S. mail shortly after they become available online.

**WESO Confidential**

Each weekday, you will receive an email, WESO Confidential, which recaps, in one convenient location, all of that day’s content from across all publications. All past issues of WESO Confidential are available on the Wealth Society website – under the “Articles” tab, select “WS Confidential.” Issues are listed chronologically, with the most recent at the top. Next to each issue, you’ll see colored labels with the abbreviations of each publication featured in the issue.

**Flash Alerts**

In the event of a change in any publication’s individual portfolios, you will not have to wait for that day’s edition of WESO Confidential. You’ll receive an immediate Flash Alert detailing the action that has been taken, as well as a complete overview of the circumstances and the recommended course of action. Our archive of Flash Alerts is also available on the Wealth Society website – simply select the “Alerts” tab. Alerts are also listed chronologically, with the most recent at the top. You’ll see the same colored labels to show you, at a glance, which publication the alert is connected to.

As you can see, it’s very important that we have your correct email address on file. See Section 5 if you ever need to update your email address or other account information.

You’ll also notice that the website displays a red bar across the top of the site for each alert we
issue. You may either click on the Alert headline to read it or simply click the white “X” on the right side of the red bar in order to hide it.

Since alerts for our options trading products are particularly time-sensitive and vital to your investing success, you may also sign up to receive Flash Alerts on your smart phone for these products. To sign up, send an email to Service@IDWealthSociety.com, provide your name and smart phone number in the email, and tell us that you want to begin receiving alerts via your phone. Once we receive your email, your number will be added to the system. Soon you’ll receive a text message on your phone asking you if you would like to receive messages. Simply text back YES.

You will continue to receive email Alerts too.

If ever you want to stop this service, simply text back STOP and we’ll take you off the list to receive text messages.

3. Communicating With Us

We are available to you through several channels, depending on your needs:

**Stock Talk**

One of the most valuable resources available to you as a Wealth Society member is the ability to engage with the analysts and your fellow members in our Stock Talk discussion forums. Each publication has its own Stock Talk forum, where you can ask publication-specific questions of the analysts and fellow subscribers. They can be accessed under the “Resources” tab on each microsite. There is also a Wealth Society-only forum which can be accessed on the Wealth Society website under the “Forum” tab.

We are especially proud of the unique and vibrant virtual communities that Stock Talk makes possible. This is an interactive feature, where both experienced and novice subscribers can come together to learn from each other and help each other out.

Stock Talk posting forms also appear at the bottom of all alerts and articles. If you have a question or comment pertaining to one particular alert or article, please post your question at the bottom of that alert or article. General questions can be posted in the general Stock Talk areas.

Before posting, please be sure to read previous Stock Talk postings and get familiar with the conversational style. Although our analysts are busy meeting deadlines, you should expect a response to your question within two business days.

**Live Web Chats**

On a regular basis, the editors from many of our publications conduct online chat sessions. Live web chat dates and times are announced on the publication microsites. You’ll also receive an email telling you the date and time of upcoming chats.

These chats are your chance to join your fellow investors and ask the analysts questions about your holdings, other investments, and anything else you would like to discuss. Past chats are also recorded and are available on the website.

**The Wealth Society Annual Summit**

As you are likely already aware, one of the greatest benefits of your Wealth Society membership is that you are invited to attend the Wealth Society Annual Summit free of charge.

The Summit takes place each spring in revolving locations, and features two days of formal presentations from our analysts mixed with fun and casual interactions around town. We will begin sending details of each annual Summit at the beginning of each year, in order to allow you to make your travel plans with plenty of notice.
**Getting In Touch With Us**

If you ever have questions regarding your service, and cannot find an answer on the Wealth Society website or various publication microsites, please don’t hesitate to reach out to us. Your dedicated member service’s contact information is listed above.

**4. Using the Website**

**Logging in for the First Time**

If you have subscribed individually to any of Investing Daily’s subscriptions before you joined the Wealth Society and you know your password and email address on record, you can now use those same credentials to log into the Wealth Society website.

If you’ve never subscribed to any of Investing Daily’s publications in the past, to log in the first time you will need to register with Investing Daily and create a password. Within two days of subscribing you should receive an email from us with your new account number. If, for some reason, you don’t have that information, please contact the Wealth Society’s member services team during regular business hours.

Once you have your account number and email address ready,

1. Go to the Investing Daily “My Account” page
2. Enter your Account Number
3. Enter the Last Name that you used as you subscribed
4. Enter the Email Address that you used as you joined the Wealth Society
5. Create a Password, and then enter it a second time to be sure
6. Click the green “Register New Account” button
7. Proceed to the Wealth Society website
8. To log in, enter your email address and new password
9. Click the yellow “Log In” button.

It is important that you use the email address here that you used when you joined the Wealth Society. If, in the future, you want to change your email address on record, see the “Do-It-Yourself” instructions in Section 5 or contact member services during regular business hours. Our email address is Service@IDWealthSociety.com.

**Logging in After the First Time**

If you ever forget your password, you can retrieve it using the “Forgot your password?” link on the website’s home page.

Simply enter your email address in the “Email address” box and click the “Forgot your password?” link. Within a minute or so, you’ll receive an email with your password in your inbox. To maintain maximum security after using this process, we recommend that you proceed to change your
password – see “Updating Your Account Information” below.

If you continue to have trouble logging in, please contact member services for help and a “Quick-Access Link.”

**Wealth Society Home Page**

The Wealth Society home page aggregates the most recent information published on each publication’s microsite into one location, making it simple to find everything you’ll need at a glance.

To get to the Wealth Society home page, click on the white Wealth Society logo on the black navigation bar near the top left of the website.

At the top of the home page, you’ll see a gray bar labeled “My Latest Issue,” which will link to the most recently published editorial issue.

Just underneath, you’ll find recent noteworthy articles from across the publications. You’ll see several of the most recent articles rotating in the top section, while additional content is listed below, in chronological order by publication date. As with the Alerts and WESO Confidential issues, you’ll see colored tabs denoting the publication that any particular article is referencing, so you can more easily prioritize what you’d like to read.

To the right hand side of the home page, you’ll find quick links to each publication’s individual portfolios, as well as the most recent Alerts, also arranged chronologically.

**Navigating Between Publication Microsites**

While much of our investing content is aggregated on the Wealth Society home page, you’ll certainly want to explore each publication’s individual microsite to delve into all of the special features and information to which you now have access.

For your convenience, there’s a quick way to jump from website to website. Once you’re logged in, click on “My Investing Daily” in the black bar. A large drop-down menu will list all of our premium services to which you’re actively enrolled. Click the name of any service to jump to that site. Think of this black bar as a binder clip that holds all the microsites together, with the WESO home page as the cover sheet.

When you’re ready to return to the Wealth Society home page, just click on “Wealth Society” on the same drop-down menu or click the white Wealth Society logo to the right of “My Investing Daily” on the black navigation bar.

**5. Managing Your Wealth Society Account**
Updating Your Account Information: Do-It-Yourself

If you need to update your postal address, email address, or password, please log into the Wealth Society website and then click on “My Account” in the top-right of the website.

Changing the Amount and Type of Email You Receive

While logged into “My Account,” you can also choose “Email Preferences.” Checking and unchecking these boxes controls what kind of email we send you. Please be sure that “Issue Notifications, Trade Alerts, and Flash Alerts” is always checked, since unchecking that box means that you won’t receive our critical trading Alerts.

Updating Your Account Information: With a Customer Service Representative

If you have any questions about your account or would like help in changing your account information, please contact our dedicated Wealth Society Member Services team. We are available Monday through Friday, from 8:30 a.m. until 6:00 p.m. Our phone number is 800-858-9992 and our email address is Service@IDWealthSociety.com.

6. Additional Resources

The Wealth Society Portfolio

The Wealth Society Portfolio, found under the “Portfolios” tab, is a foundation for the equity portion of a diversified portfolio, comprised of top stocks across sectors worthy of space in any long-term investor’s holdings. We also recognize the importance of preserving your capital in a tumultuous market.

The Wealth Society Portfolio includes a selection of Conservative Holdings and a selection of Aggressive Holdings drawn from most Investing Daily equity advisories.

It’s designed to represent current thinking on the best foundation for the equity portion of a diversified asset-allocation model. It’s based on a consensus view of the present macro situation, fundamentals for individual markets, sectors poised to outperform, and the companies best positioned to grow their businesses and thus total returns for shareholders on a risk-adjusted basis.

It’s a model portfolio generally organized according to the 10 sector/industry classifications established by Standard & Poor’s. Selections are presented in order of favored sector and favored stocks within each sector. Sector weightings are based on a combined view of the Portfolio.

The best source of up-to-date information is the advisory of recommendation, noted in the Comment column. And, of course, we offer advice as to what to do now if you have capital that needs to be put to work – up to, as always, our value-based buy-under price.

Issue Archives

While you can find all of our Issue Archives on each publication microsite, we’ve aggregated every publication’s Issue Archives on the Wealth Society website. You can find the archives, sorted by publication and by year, under the “Issue Archives” tab.

Special Reports

Our analysts occasionally publish short bonus reports on various topics of particular interest.
to subscribers. While these can all be found on each publication microsite, we’ve aggregated all of these reports on the Wealth Society website. They are sorted chronologically by publication.

**Conclusion**

Dear Member,

I hope that you’ve found this Member Guide helpful. If you have any suggestions for improvement, please email them directly to me at jpearce@InvestingDaily.com or to Wealth Society President Phil Ash at pash@InvestingDaily.com. Your ideas will smooth the way for other Wealth Society members who come after you.

As you begin your exploration of the wealth of information and analysis now available to you, I believe you will soon come to enjoy our member community almost as much as you enjoy the additional income!

We truly believe in “members helping members,” and as you gain experience and insights, we all look forward to hearing about your progress and cheering you on.

Phil and I, along with our team of analysts from across the publications, and your fellow Wealth Society members, also look forward to meeting you in person at the annual Wealth Summit.

In short, we look forward to not only helping you achieve your biggest financial dreams, but to sharing the journey with you!

To your success,

Jim Pearce, Director of Portfolio Strategy  
Investing Daily Wealth Society