



Community Based Investment Enterprises

Introduction

Community Based Investment Enterprises (CBIEs) are a modern innovation on traditional investment club models that provide economic education & programming to underserved youth, families, and communities. It's a step by step program that teaches you to establish the enterprise, research stocks & create a real investment portfolio.

CLIMB USA's Community Based Investment Enterprise (CBIE's) training program, completed its fourth cycle of cohort training this Spring. Program Coordinators Akari Muhisani and David McClellan, welcomed a new group of individuals and teams to the process of financial independence by learning how to create their own investment clubs or CBIEs.

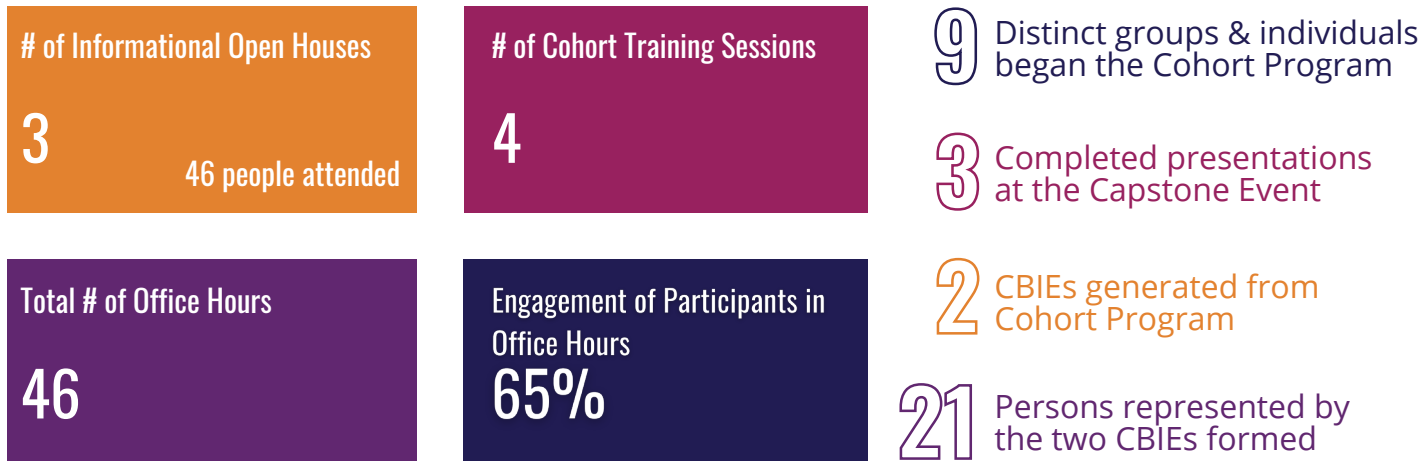
The curriculum for the program consists of three 60 to 90 minute training lessons conducted once a month from January through March. A final Capstone program was held in April that included a program review and an opportunity for participants to present their first stock presentation to their program cohorts. To support the monthly sessions, Program Coordinators hosted Office Hours twice a week where the teams met virtually over Zoom to ask direct questions and received one-on-one support.



We thank **BetterInvesting** and its multitude of everyday citizens who have hewed the wealth creation pathway for others to follow. CLIMB partners with BetterInvesting, fully endorsing the BetterInvesting principles and methodology and recommend all of our CBIEs use their Stock Selection Guide and myICLUB platform.

CLIMB USA CLIMB USA is a 501c3 non-profit organization that is developing a community of youth and families that are all learning the economic way of thinking and living within a strategically organized ecosystem. The key elements of our economic empowerment framework include youth development, building wealth through investment clubs, entrepreneurial training, and thought leadership.

Member Data



Stock Analysis Presentation



MONA COOPER

Go Beyond Investments, LLC

Presented an outstanding Stock Analysis of Elf Beauty Inc at CLIMB's CBIE Capstone Session in April 2024.



First Ever CLIMB USA Investor's Summit. On June 5th, 2024, we hosted our first ever CLIMB USA Investor's Summit. The goal for this event was to bring previous cohort program participants together, check in on their newly formed CBIEs and to welcome our new cohort graduates into the CLIMB CBIE family. 15 CLIMB USA investors took time out on a weeknight to attend the discussion. After a brief review of some investment club foundational investment principles, we had a lively discussion about the next steps to help grow the CBIE movement.

Aggregated CBIE Data

CLIMB's CBIE Altimeter

as of 12/2023	Number of CBIEs	Invested Amount	Portfolio Value	Amount Withdrawn*	Portfolio Value Plus Amount Withdrawn
CLIMB CBIEs Wisconsin	10	\$31,761	\$32,061		\$32,061
CLIMB CBIEs Beyond Wisconsin	4	\$11,900	\$12,700		\$12,700
Case Study CBIEs	3	\$600,000	\$987,000	\$570,000	\$1,557,000
Totals	17	\$643,661	\$1,031,761	\$570,000	\$1,601,761

* Withdrawn funds have been used for buying homes and other real estate, entrepreneurial pursuits, education and training expenses and retirement stabilization, car purchases, paying down debt, vacations, community development and philanthropy.



Want to learn more about CBIEs?

A FREE step-by-step program that teaches you to establish the enterprise, research stocks & create a real investment portfolio. Next Cohort starts Fall 2024!