



Sussex Investment Club Membership Application Pack

Introduction

The Sussex Investment Club was formed by founder and stock analyst Chris Chillingworth in 2018. After some modest success in identifying well performing businesses for his own investing between 2014-2018, Chris began to share his analysis notes with interested friends and family. This then extended into what eventually became a reasonably successful online blog, and later into a series of 50 Youtube videos called 'The FTSE Show'. The success of the blog and youtube show led to significant interest in Chris's work from everyday UK retail investors. So, in 2018, Chris started this club, although at the time, it had no name. Membership to the club started small and grew, largely via word of mouth. Hitting 28 members by the end of the year. Due to the success of the The FTSE Show, and the Diary of a UK Stock Investor Podcast, the membership grew to just under 100 members by 2020. As of October 2024, the membership consists of 150 members.

Our Investing Philosophy

Utilising Chris's ongoing analysis of UK FTSE stocks, the club specialises primarily in the identification of wonderfully performing stocks. These stocks, once identified, are added to our 'Watchlist Report'. Sent out every Saturday morning to our members, the report showcases all the stocks that meet Chris' strict criteria, as well as providing a breakdown on which of these stocks are priced at a level that makes sense for buyers.

Our philosophy is simple. We buy shares in wonderfully financially sound businesses, at prices that make sense to do so, and hold them until they stop being wonderful businesses. This can often mean adopting and embracing a 10-20 year outlook on these investments.

These are typically companies with high profit margins, low to no debt, growth trends in both sales and net profits, rising net worth and a strong management team employing the right growth strategies. We look for companies that not only make substantial profit every year, but who also use that profit in the right way to encourage further growth. We want companies whose share price will rise from £5 to £50 over those 10-20 years. This is typically only achieved by businesses that re-invest into themselves using their own profits.

We have no interest in trying to predict what a stock price might do. It is the memberships belief that this is not a skill any of our members possess. We focus largely on a philosophy of 'facts and story' over 'opinions and theories'. It should be noted by any prospective members, that we actively discourage these opinions and theories on stocks from the chat room. Opinions and theories on what a stock "might" do, are rarely useful and can lead members astray from the facts.

We do not 'trade' short-term markets. When we invest in businesses, we do so with the real intention of potentially holding them for 10-20 years. Perhaps longer depending on your investment goals. All members retain full autonomy of their portfolios and can do as they wish with their investments. However, buying stocks with the intention to make a quick sale or a quick profit is not our style and you will find little interest for this approach in the club.

Instead, our members embrace the teachings and philosophies of the legendary billionaire investors of our time. Benjamin Graham, Warren Buffet, Charlie Munger, Peter Lynch, Sir John Templeton and Phil Carret to name a few. These are all investors that not only made billions from investing in stocks, but also kindly shared with the world how they did it.

Our members embrace the power of compounding, over time, to grow their wealth. And with the combination of knowing the right stocks to invest in, with the right price to buy them at, it would actually be unreasonable to expect anything other than success.

Benefits of Membership

There are numerous benefits of being part of the Sussex Investment Club that go far beyond a simple improvement in stockmarket returns. To name a few:-

Security

By only considering stocks with strong financial performance, low to no debt, and rising net worth, we are significantly reducing the risk of investing in stocks. The identification of these stocks/businesses steers our members away from the poor performing stocks, and towards those worth their time and effort.

Time

There are 1000 UK FTSE stocks in existence and over 5000 US stocks. The everyday investor does not have the time available to accurately and consistently identify and analyse this many stocks. The membership provides our members with a fastrack solution for not only identifying the best stocks to invest in, but provides the ongoing analysis of these companies to ensure they still remain wonderful businesses.

Community

Our members are all in the same boat, singing from the same hymn sheet. We are everyday retail investors, with experience that ranges from those just starting their investing journeys and buying their first stocks, to members with six-figure portfolios. Some of our members have been with the club since it's inception back in 2018 and will happily share their results in the chat room. The exclusivity and strong door-policy we employ ensures that only likeminded long-term investors are permitted entry to the club. New members find our membership welcoming and helpful. Willing to help with any questions. All members are permitted access to our online Discord chat-room. Where members can opt to chat with other members who are all using the same Watchlist Report to help steer their investing decision making.

Results

Of course, the above benefits do not add enough value on their own. The membership must get results. And it does. Since 2014, over that decade, the watchlist of handpicked stocks has collectively achieved an average annual growth rate of 18.5%, not including dividends which typically contribute between 2-4% a year in additional returns. As a comparison, the FTSE All-Share Index, the UK's largest index which encompasses most of the UK stocks, has made 2.5% a year annual average return, not including dividends. Of course, many of our members have achieved better, as their portfolios contain their own unique make-up and blend of the various handpicked stocks found in the Watchlist Report. But the above demonstrates the powerful impact of handpicking the right companies and holding them over time.

How Does It Work?

Every Saturday, members receive an updated 'Watchlist Report'. This report showcases all the handpicked stocks that meet our Chief Analysts very high criteria. The report also shows which of these stocks are 'priced right' for buying that week.

Our members utilise this report to better inform their own investment decisions. 99% of our membership use a Stocks & Shares ISA to build a portfolio of stocks, which can be opened via various different brokers across the UK. Of course, the choice of investment vehicle, and broker, is entirely up to each individual member.

We do not invest your money on your behalf. We provide the analysis, and the already above mentioned benefits which come with this.

In addition to the Watchlist Report, members are also given access to our archive of Deep Dive Reports. These are typically 6-7pg .pdf reports, one for each of the stocks that appear on the Watchlist. These breakdown, in detail, the precise reasons 'why' the stock passed all our tests. It includes a chronological history of the businesses progress and what they do, often going as far back as 15 years where applicable. These reports also include a breakdown of the financial analysis and pricing analysis for that stock. These reports are updated every year once the company release their latest Annual Report.

Membership Rules

1. We retain the right to expell any member from the membership. Membership to our exclusive club is considered a privilege. Anyone who is kicked out will have their membership closed, and no additional funds will be taken from their account. The membership does not owe anyone access to our club beyond what you have paid for.
2. By completing an application to join the Sussex Investment Club, members acknowledge that they are not being given financial advice. We provide factual data only, presented with experience, to help members make informed decisions. We are not financial advisors. Nor do we provide financial advice, because for it to be so, it must be tailored to your personal situation, which this is not. The information we provide in our reports is there to be used however you see fit.
3. In the past, one or two members have chosen to use their access to the investment club to promote their own ideas and theories on certain stocks. We ask that all joining members understand that we leave our egos at the door. Any member who wishes to use the investment club as a vehicle to share their own ideas and theories on stocks, will not be welcome. This is an important part of our door policy, and whilst every now and again someone will slip through the net, once they make their intentions clear, they do not tend to last long here. Discussing which stocks you like and dislike is considered absolutely fine. But any attempt to persuade others, or promote your own analysis on stocks, is not welcome here.
4. No abuse. Don't be rude. We are incredibly proud of the small community we've built so far. And opening it up to more people runs the risk of the wrong people getting in. Again, if we decide we do not want to work with you any longer, you will be kicked out.
5. No soliciting in the club chat rooms. No promoting other peoples investing related content. This isn't an ego trip on our part. It is to protect our newer 'greener' members who can at times be easily swayed and influenced by assuming other members know better than they do. We wish to keep the chat room focused on content produced by Chris, so that we can better police the quality of information being shared in the group.
6. Any application made to the Sussex Investment Club for membership assumes the acceptance and agreement to abide by the above points. If you do not agree with our rules, we respectfully ask you do not apply to join.

Application Form

FULL NAME	<input type="text"/>		
DOB	<input type="text"/> / <input type="text"/> / <input type="text"/>	OCCUPATION	<input type="text"/>
ADDRESS	<input type="text"/>		
	<input type="text"/>		
TOWN	<input type="text"/>		
COUNTY	<input type="text"/>	POSTCODE	<input type="text"/>
CONTACT TEL.	<input type="text"/>		
CONTACT EMAIL	<input type="text"/>		

BACKGROUND - Briefly, please provide a background on your investing experience, if any. How long have you been investing? What types of investing? And how things have been going for you.

FINANCIAL EXPECTATIONS - Briefly, please explain what your financial expectations are. What is the end goal you hope to achieve? In what time frame? How much are you hoping to achieve financially?

CLUB EXPECTATIONS - Briefly, please explain what you are looking to gain from membership? What are the drivers behind your application? What benefits of the club appeal to you the most?

KNOWLEDGE - Please confirm which, if any, of our online content you have consumed prior to applying.

- 'Diary of a UK Stock Investor Podcast Episodes'
- How to Get Started Investing 'FREE COURSE'
- How to Analyse Stocks Course (£297.00)
- Chris' Instagram Page
- The FTSE Show Youtube Series
- The CLEAN Guide to Making Money Book
- The CLEAN Guide to Investing in the Stock Market Book

RESEARCH - How did you find out about the investment club?

Upon full completion of this application form, please send it via email to chris@chrischillingworth.com for consideration.

Date

Signature