

McLean County Museum of History

Emerson Street Investment Club

Processed by
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Summer 2017

Collection Information

VOLUME OF COLLECTION:	1 Box
COLLECTION DATES:	1997 - 2017
RESTRICTIONS:	None
REPRODUCTION RIGHTS:	Permission to reproduce or publish material in this collection must be obtained in writing from the McLean County Museum of History
ALTERNATIVE FORMATS:	None
OTHER FINDING AIDS:	None
LOCATION:	Archives
NOTES:	

Brief History

The Unitarian Investment Club began in 1990 as managers of a fund of loans and gifts to the Unitarian Church. The original 17 members donated or loaned a total of \$2500. The Club disbanded in 2014 and the total amount of its worth, \$14,625.41 was donated to the church for furnace replacement.

The Emerson Street Investment Club (the Unitarian Church is on Emerson Street) was formed in 1991. The purpose of club was to educate members on investments in the stock market. This club was also entrusted with the management of the Unitarian Investment Club portfolio. The group began as a partnership and was converted into a corporation in 2002. They met monthly for 23 years and disbanded August of 2014.

Scope

This collection contains the Partnership Agreement, By-Laws, and history of the Unitarian Investment Club and the Emerson Street Investment Club along with the miscellany of calendars, brochures and general office bookkeeping plus 17 folders of minutes for each year from 1997 through 2014.

Box and Folder Inventory

Folder 1: Partnership Agreement, By-Laws, History

- 1.1 Partnership Agreement of the Emerson Street Investment Club, September 16, 1991, 25 items 2 copies.
- 1.2 By-Laws of Emerson Street Investment Club, Inc., no date, 9 pages.
- 1.3 The Unitarian Investment Club & The Emerson Street Investment Club history and closing, November 1, 2014, 2 pages.

Folder 2: Miscellaneous

- 2.1 Proxy form, 3 on 1 page.
- 2.2 Yearly Calendar for Emerson Street Investment Club
- 2.3 Brochure outlining history, purpose, and contact information of the Emerson Street Investment Club,
- 2.4 Form BCA-2.10, Articles of Incorporation, Emerson Street Investment Club, Inc.
- 2.5 Letter to Emerson Street Investment Club regarding Power of Attorney for member, December 13, 1999. Includes notarized Power of Attorney and Durable Power of Attorney.
- 2.5 Internal Revenue Service form Notice of Acceptance as an S-Corporation, Apr. 29, 2002.

- 2.6 Value-Line Publishing, Inc. paid bill \$598, 07/30/2002.
- 2.7 copy of letter from Rep. Barney Frank to Chairman Oxley regarding conflicts of interest and other practices at Citibank and Salomon Smith Barney, November 14, 2002.
- 2.8 Letter to Unitarian Church Investment Club from Scottrade, Inc. informing client of change of address, November 13, 2007.
- 2.9 Notarized letter to E*Trade regarding membership and address change, October 3, 2008.
- 2.10 McLean County Historical Society Gift Agreement from Emerson Street Investment Club donation of papers, 12-27-2012.
- 2.11 Thank you from Greg Koos on McLean County Museum of History letterhead for donation of Investment Club minutes, January 21, 2013.
- 2.12 McLean County Historical Society Gift Agreement from Emerson Street Investment Club donation of papers, 6-21-2017.

Folder 3: Minutes 1997

- 3.1 Emerson Street Investment Club minutes typed and individually clipped for each month January, except August, through December, 1997.
- 3.2 Two page sales and earnings chart for 1997.

Folder 4: Minutes 1998

- 4.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 1998.
- 4.2 Four page summary, individual accounts, securities held, 1998.

Folder 5: Minutes 1999

- 5.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 1999.

Folder 6: Minutes 2000

- 6.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2000.

Folder 7: Minutes 2001

- 7.1 Emerson Street Investment Club minutes typed for each month January through December, 2001.

Folder 8: Minutes 2002

- 8.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2002.

Folder 9: Minutes 2003

9.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2003.

Folder 10: Minutes 2004

10.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2004.

Folder 11: Minutes 2005

11.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2005.

Folder 12: Minutes 2006

12.2 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2006, and annual report.

Folder 13: Minutes 2007

13.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2007, and annual report.

Folder 14 Minutes 2008

14.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2008, and annual report.

Folder 15: Minutes 2009

15.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through (October missing) December, 2009, and annual report.

Folder 16: Minutes 2010

16.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through (May missing) December, 2010, and annual report.

Folder 17: Minutes 2011

17.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2011.

Folder 18: Minutes 2012

18.1 Emerson Street Investment Club minutes typed and individually clipped for each month January through December, 2012.

Folder 19: Minutes 2013

19.1 Emerson Street Investment Club minutes typed and individually clipped for each month (no January) February through December, 2013.

Folder 20: Minutes 2014

20:1 Emerson Street Investment Club minutes typed and individually clipped for each month January (no June) through July, 2014.

20.2 e-mail to members announcing disbanding of Emerson Street Investment Club after 23 years,