



# Personal Investment Training

## Private Lessons

Invest Academy

Learn to invest from the professionals.

www.investacademy.com +1.212.784.6476

## Overview

**Personal Investment Training** is a completely unique program, designed to teach novice investors how the capital markets work, how to find good investment opportunities, how to manage your own portfolio and become a self-sufficient, successful investor with insider tips and secrets that only a professional investor could provide.

The course is devised to methodically explain practical investing - incorporating market fundamentals, practical guidelines to disciplined low risk investing, and learning to use free online tools and resources that are indispensable to outstanding trading performance.

The course material is based on our group Course 101. However, with this personalized training, your instructor will work with you to emphasize the areas that interest you the most. One of the main benefits of private tutoring is the personal attention not available from any other educational format. Our professional instructor will work with you at your own pace, concentrating on topics most relevant to your needs.

Feel free to schedule the private sessions to work around your personal schedule and learning strategy. Whether you want to meet with your instructor for eight days in a row, or spread out the sessions over a period of several weeks, is up to you.

Take your financial future into your own hands by acquiring the practical knowledge and secrets of investing through this affordable, customized private training.

### Some of the practical tools the students will enjoy:

- > Analysis and case studies of current events in the market as they apply to the course material
- > Step-by-step methodical process for screening, evaluating and buying/selling stocks
- > Personal attention allows you to concentrate on areas that interest you the most
- > A professional investor, will serve as a first-hand source of insider tips and practical techniques
- > Continued support even after private sessions have ended through email or phone
- > Access to our Investor Forum, where you can ask questions and exchange ideas with other students

### Brief Curriculum:

Part 1: Investing in Stocks

Part 2: Analyzing Stocks

Part 3: Trading Securities

Part 4: What's Moving the Markets

Part 5: Introduction to Fixed Income

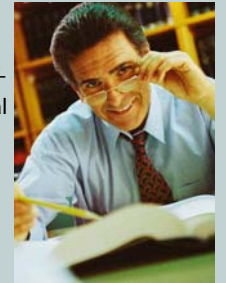
Part 6: Mutual Funds

Part 7: Portfolio Management, Risk & Psychology

## Learning Outcomes

### At the end of the course, participants will be able to:

- Find the most promising stocks & identify the stocks you should avoid
- Read technical patterns & indicators and generate buy/sell signals
- Build and track a portfolio of stocks and mutual funds
- Determine your tolerance for risk and learn to avoid common mistakes
- Learn to efficiently use free web tools for research and analysis
- Choose a broker and effectively execute trades



## Course Details:

<b>Duration:</b>	32 Hours
	8 Sessions
	4 Hours per session
<b>Level:</b>	Beginner
<b>Prerequisites:</b>	None
<b>Tuition:</b>	<b>\$2,900</b>
<b>Location:</b>	Broadway Class or TBD

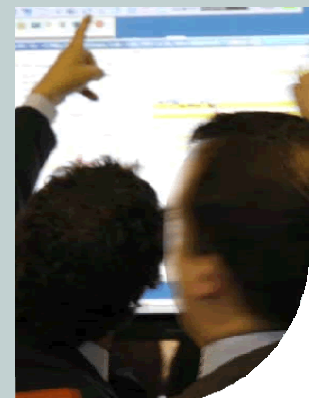
## Course Highlights:

### You Will Learn & Practice:

- Discover the secrets and fundamentals of investing in stocks, bonds & mutual funds
- Master the lingo of investing; Communicate with friends and associates with improved knowledge of investing
- Learn how to use free & powerful online tools for research and analysis
- Learn how to avoid common mistakes & pitfalls that investors makes
- Instructors are experienced investment professionals with real world examples & case studies
- Personal attention catering to your interest

## In this syllabus:

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# Course Agenda

Part 1 ***Investing in Stocks***

Part 2 ***Analyzing Stocks***

Part 3 ***Trading Securities***

Part 4 ***What's Moving the Market***

Part 5 ***Introduction to Fixed Income***

Part 6 ***Mutual Funds***

Part 7 ***Portfolio Management, Risk & Psychology***

Part 1

## ***Investing in Stocks***

*Stocks versus other investments, the wonders of compounded interest, cutting the market into sectors and industry slices, investing for the long run*

- |   |                                    |
|---|------------------------------------|
| 1.1 Owning company shares                       | 1.5 Exploring industries & sectors |
| 1.2 Why do companies go public?                 | 1.6 Dividends & stock splits       |
| 1.3 Advantages & disadvantages of owning stocks | 1.7 The magic of compounding       |
| 1.4 Types of stocks                             | 1.8 Why stocks perform the best    |

Part 2

## ***Analyzing stocks***

*Two approaches to analyzing stocks: analyzing growth & value (the fundamental school) and analyzing patterns of price movements (the technical school)*

- |  |   |
|--|---|
| 2.1 Fundamental analysis                                 |   |
| • 2.1.1 The income statement                             |   |
| • 2.1.2 The balance sheet                                |   |
| • 2.1.3 Using multiples and financial ratios             |   |
| • 2.1.4 Understanding value investing principles         |   |
| • 2.1.5 Influence of company growth on stock performance |   |
| • 2.1.6 Sorting out public filings                       |   |
| 2.2 Technical analysis                                   |   |
| • 2.2.1 Basic concepts of technical trading              | • 2.2.4 Channel lines                                   |
| • 2.2.2 What is trend?                                   | • 2.2.5 Bounce & retracement                            |
| • 2.2.3 Chart types: Close, Bar, Candlesticks            | • 2.2.6 Price gaps                                      |
|  | • 2.2.7 Support & Resistance                            |
|  | • 2.2.8 Price patterns                                  |
|  | • 2.2.9 Moving averages                                 |
|  | • 2.2.10 Recognizing reversals with a candlestick chart |
|  | • 2.2.11 Fibonacci Numbers                              |
|  | • 2.2.12 Volume and technical analysis                  |
|  | • 2.2.13 Using the internet to analyze your stocks      |

## Part 3

### ***Trading Securities***

*Learn how to buy and sell stocks, how the stock exchanges work, and how to choose your broker.*

#### 3.1 Getting started

- 3.1.1 Price quotes
- 3.1.2 Types of orders
- 3.1.3 Buying on margin
- 3.1.4 Shorting stocks
- 3.1.5 Reading the stock tables

#### 3.2 How to make money at opening and closing

#### 3.3 How does the NYSE work?

#### 3.4 How does the NASDAQ work?

#### 3.5 Using ECNs

#### 3.6 Brokerage Firms—Choosing the right broker for you and what your broker won't tell you

#### 3.7 10 Rules for executing better trades

## Part 4

### ***What Moving the Markets***

*The Economy, The Players & the News. Learn how to interpret economic indicators, know the key players in the market and understand how they move it. Learn what important news events you should look for.*

#### 4.1 The Federal Reserve & FOMC

#### 4.2 Major economic indicators & news

- 4.2.1 Consumer confidence, CPI, Beige book
- 4.2.2 Industry-oriented indicators
- 4.2.3 Commodities & Currency price movement

#### 4.3 The key players in the market

- 4.3.1 Insiders
- 4.3.2 Institutions
- 4.3.3 Hedgers & Arbitrage players
- 4.3.4 Individual Investors & Day Traders

#### 4.4 Interpreting Financial News

- 4.4.1 Understanding & using live financial news that moves the market (i.e. CNBC, MarketWatch)
- 4.4.2 "Noise" Versus Newsworthy events

#### 4.5 Key Company Events

- 4.5.1 Earnings surprise & Future Guidance
- 4.5.2 Analyst Upgrades/Downgrades
- 4.5.3 Takeover Bids

## Part 5

### ***Introduction to Fixed Income***

*The basics of bonds, how to invest in them and their affect on the stock market.*

#### 5.1 Bonds Basics

- 5.1.1 The lifespan of a bond
- 5.1.2 Interest vs. Discount
- 5.1.3 Relationship of price to yield

#### 5.2 Corporate bonds

- 5.2.1 Why companies issue bonds
- 5.2.2 Credit quality & Bond Rating
- 5.2.3 High yield bonds (Junk Bonds)

#### 5.3 Government Bonds

- 5.3.1 Treasuries & T-Bills
- 5.3.2 The yield curve
- 5.3.3 How to read the Gov't bonds tables

#### 5.4 Bonds yield and other investments

- 5.4.1 Gov't bonds yield and your mortgage
- 5.4.2 Relationships between Gov't bonds yield & the stock market

## Part 6

### ***Mutual Funds***

*How do mutual funds work? The advantages & disadvantages of investing in mutual funds, using ETFs for multiple sector diversification, and practical guidance for choosing the best fund for you.*

- 6.1 What is a mutual fund?
- 6.2 The mutual funds market
- 6.3 ETFs: Concepts and practical investing
- 6.4 Understanding the mutual funds tables
- 6.5 Advantages
  - 6.5.1 Simplicity & Liquidity
  - 6.5.2 Diversification & Indexing
  - 6.5.3 Management's edge, Access to research & IPOs
- 6.6 Disadvantages
  - 6.6.1 Hidden costs & impact on performance
  - 6.6.2 Hidden risks of fund ownership
  - 6.6.3 Impact of fund size on performance
- 6.7 Choosing the best fund for you
  - 6.7.1 What is the right fund for you?
  - 6.7.2 Breaking myths of fund's past performance
  - 6.7.3 Using Morningstar's rating
- 6.8 Hedge Funds

## Part 7

### ***Portfolio Management, Risk & Psychology***

*Setting your risk tolerance, building your portfolio, and understanding the psychology of investing.*

- 7.1 Finding your tolerance for risk
- 7.2 The Risk/Reward ratio
- 7.3 Building your portfolio
  - 7.3.1 Diversification—practical guide
  - 7.3.2 Using asset allocation
  - 7.3.3 Measuring your performance
  - 7.3.4 Using online portfolio tracking tools
- 7.4 Investor psychology & discipline
  - 7.4.1 10 Commandments for disciplined investing
  - 7.4.2 Identifying your strengths & breaking bad habits
  - 7.4.3 Filtering out "expert" opinions

### **Course Structure**

- **Total 32 Hours**  
**Eight sessions**  
(Four hours per session)

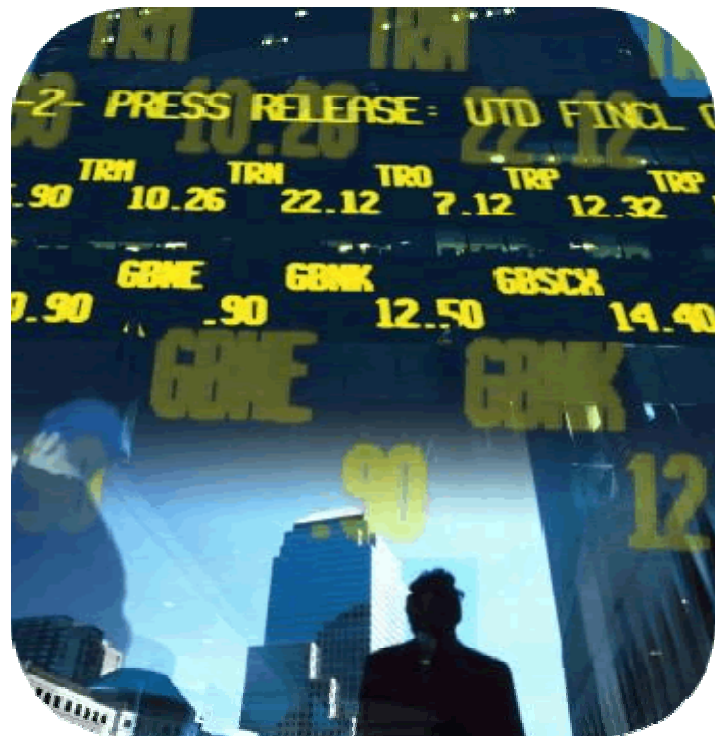
### **Tuition**

**\$2,900 + Tax**

### **Location**

#### **Broadway Class**

1375 Broadway , 3rd floor (At Broadway & 37th St.)  
New York, NY



# Special Bonuses for Our Students

## Class Material Binder & CD

Each student will receive a binder with all class slides and material printed. The printed slides have room to write notes. Also included are class exercises, handouts and a CD with graphics and charts.

All material is organized in accordance with the curriculum.



## Membership

Graduation from our courses does not mean your relationship with us ends. Our graduates receive access to our special investor forum, where you can ask questions and exchange ideas with instructors as well as other investors like yourself. We will also invite you to participate in our annual conference, free of charge.



## Invest Academy

1375 Broadway  
3rd floor  
New York, NY 10018

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email: [contact@investacademy.com](mailto:contact@investacademy.com)

### Directions:

All classes will be at our Broadway Class in midtown Manhattan, walking distance from the major Trains and Bus stations in NYC.

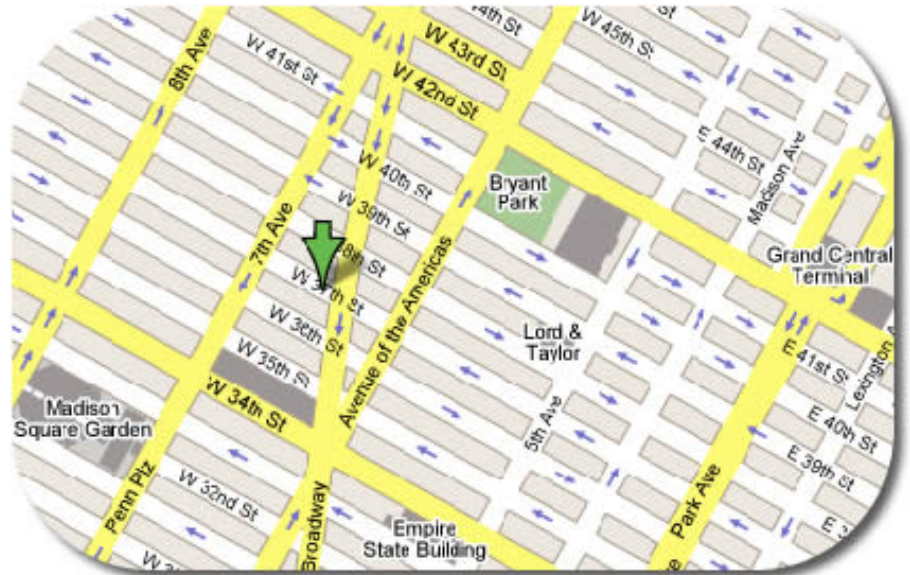
### Our Address:

1375 Broadway, 3rd floor (on Broadway & 37th St.)

**From Times Square:** Walk 4 blocks south on Broadway

**From Penn Station:** Walk 3 Blocks north. From 37th St. walk 1 block east

**From Herald Square:** Walk 3 blocks north on Broadway



### Payment Options:

- Cash
- Check
- Major Credit Cards



- Q N R W** Herald Square or Times Square
- I 2 3** Penn Station or Times Square
- B D F V** Herald Square
- A C E** Herald Square or Times Square
- 7 S** Times Square

**LIRR** (Penn Station), **NJ PATH** (Herald Square)

For further information on  
the course and  
Invest Academy, visit:  
[www.investacademy.com](http://www.investacademy.com)