1. Understanding different investment choices
   a. Banking, CDs, Money Markets
   b. What is a stock?
      i. Understanding mutual funds
      ii. Understanding ETFs
   c. What is a bond?
      i. Corporate—
         1. Understanding credit worthiness
         2. Understanding cash flows from bonds
         3. Understanding differences between coupon payment and yield
      ii. Treasuries—
         1. The risk-free rate of return
         2. Yield curve
      iii. Municipal Bonds
   d. What’s the big deal about gold and other precious metals?
   e. What’s the big deal about FX, currency speculation and hedging?
   f. Investing in real estate
   g. How have gold, bonds, stocks, cash, Treasuries, real estate performed over time?
      i. Understanding risk based on asset type and investing horizon

2. How the stock market works and what makes it move
   a. What are the exchanges
   b. What is an IPO versus secondary market
   c. Market timing
      i. Understanding business cycles
      ii. Bull and Bear Markets
         1. Understanding the trend
         2. The trend is your friend
         3. Learning to anticipate trend changes
      iii. Difficulty of market timing
      iv. Cost of poor market timing
   d. Choosing a broker
      i. Different types of brokers
      ii. Understanding their Fees
      iii. Making sure you are opening/trading in the right account
         1. Trading account
         2. Tax Free account iv. FDIC insurance
   e. Why stocks are your best bet to earn a consistently high return
   f. Individual Stocks versus Mutual funds
      i. Fees of Mutual funds
      ii. Index ETFs
      iii. Few funds consistently outperform the market
3. Making your first trade
   i. Looking up a ticker symbol
   ii. Understanding a stock quote page
      1. Open, hi, low, close
      2. Bid/ask
      3. Charts
      4. Dividends
      5. EPS
      6. PE ratio
      7. Volume
      8. Market Cap
      9. ROI and ROE
     10. Book Value
     11. Profit Margin
   iii. Order types (market/limit/stops)
   iv. Day order/GTC
   v. Buying on Margin
   vi. Short Selling
   vii. Calculating gains and losses
   viii. Comparing your portfolio to benchmarks

4. Building your $100,000 portfolio
   a. Risk and Diversification
      i. Across industries
      ii. Across market caps
      iii. Across dividend yields
      iv. International and emerging markets
      v. Precious metals, commodity ETFs
      vi. Dollar Cost Averaging when buying
      vii. Dollar Cost Averaging when selling too
      viii. Sharpe Ratio
   b. What do I buy? Finding Stocks and understanding what makes stock prices move
      i. Invest in what you know. Don’t listen to rumors. Buffett and Peter Lynch as examples of basic stock picking
      ii. Build a portfolio of non-losers, and try to find one or two tenbaggers
      iii. Use Stock Screeners to find stocks
      iv. Review of popular analysts and websites

5. Now that I own it, when do I sell it?
   a. Rule #1 – Ride your winners and cut your losses
   b. Exit strategies and protecting your value
      i. Using stop loss orders
INVESTING 101 COURSE OUTLINE (10 CHAPTERS)
Take Control of your financial future

ii. Using Trailing Stops

c. Identifying market tops

6. Fundamental analysis—Understanding earnings and cash flow
a. As it relates to both buying and selling
   1. Understanding 10Qs and 10Ks
   2. Revenue and earnings
   3. Management
   4. EPS and Cash flow per share
   5. Earnings estimates
   6. New products
   7. Competition
   8. Alpha and Beta

7. Technical analysis—Common charting terms
a. As it relates to both buying and selling
   1. How to read stock charts
   2. Double bottom
   3. Cup and saucer
   4. Breakout
   5. Bases and trendlines
   6. MACD
   7. Fibonacci ratios
   8. Moving averages
   9. RSI
   10. Support and Resistance
   11. Bollinger Bands
   12. Head and shoulders
   13. Wedges and flags
   14. Candlesticks

8. Current Hot Topics in Trading
a. Day Trading
b. Swing Trading
c. Penny Stocks
d. Buy and Hold
e. Growth at a Reasonable Price
f. Insider transactions
g. Investor sentiment
h. Arbitrage

9. Introduction to Options
a. What are options
b. Option pricing-Black Scholes model

c. Call options

d. Put options

e. Writing covered calls

f. Volatility

g. Implied volatility

h. Spreads

i. Put vs Call interest

10. Survivor’s Guide to Success

a. Ten Key Things to Remember

b. Ten Mistakes to Avoid

c. Staying informed, it’s a continuous process
   i. Investment Newsletters
   ii. Money management techniques
   iii. Follow the market news at Survivor University

d. Practice makes perfect, learn from your mistakes, keep accurate records, use our Trading diary

e. Developing your investing strategy and sticking to it. Finding a strategy that is right for you
   i. Understanding who you are…
   ii. Coming to terms with your current financial fitness
   iii. Take our brief Financial Fitness Test
   iv. Let’s be honest in assessing our current situation
   v. how average net worth for different age groups using pie charts
   vi. Show recommended asset allocations for different age groups using pie charts