



Beginner Investing Foundations

Course Outline

Session 1: The Basics

My Top Guidelines

- Don't rush out and make investment decisions right after this class
- Only use money you can afford to lose
- Study, study, study
- It takes a lot to be an expert
- Start saving now so you have capital to invest
- Find a mentor

Opinions

- We all have them. How do they affect your investing style?

Why Invest

- What is the purpose of investing?

The power of compounding interest

- What drives the market - Fear and Greed
- Understanding the cycle of emotions

The mental aspect - How psychology, beliefs & emotions affect your investing

- Psychology and how it will affect your investing
- Heart beliefs and how they will affect your investing
- Building your investment strategy
- The four classes of assets. Business, paper, real estate, Commodities
- Recommend resources
- Homework

Session 2: Investing in Paper Assets

Review My Top Investing Guidelines

Develop Your Investing Rules

- What are your investing rules
- Taking profits. You can't go broke making a profit. Leave something in the deal for the next guy

Paper Assets

- Pros and cons of paper assets
- Types of paper assets
- Funds
- Index funds
- How psychology, beliefs & emotions affect investing in paper assets



- Definitions of common terms: Bear market vs bull market. Correction
- Fundamental vs technical analysis
- How a trade actually happens
- Definitions: Liquidity, market maker, High frequency traders and how these affect your trading

The art of the chart

- Explain different charting types eg OHLC, Candlesticks, etc
- How to build trend lines
- Other common indicators: RSI, Bollinger bands, volume, etc
- Logging into an online platform and what it looks like

The most common ways it goes wrong

Recommended Resources

Homework

Session 3: Investing In Real Estate

Review My Top Investing Guidelines

Investing Seasons

- Discuss how every investment type has seasons. Summer, Fall, Winter, Spring
- How will you navigate each season:
 - Spring - Making investments after a winter
 - Summer - Seeing abundance/opportunity everywhere
 - Fall - Managing taking profits
 - Winter - Navigating the downturns

Real Estate

- Most millionaires are made through real estate than any other class
- Why? Leverage. Explain leverage
- Overview on real estate buying process. High level overview on:
 - Contracts
 - Mortgage
 - Down payments
 - Closing costs
 - HOA's
 - Taxes
 - Rental laws
- Explain most common real estate investing strategies.
 - Wholesaling/Sub to
 - Renovation/Fix and flip
 - Residential Rental
 - AirBnb
 - Multi-unit
 - Commercial Rental



The most common ways it goes wrong

Recommended resources

Homework

Session 4: Investing in Businesses

Review My Top Investing Guidelines

Businesses

- Most billionaires made their money through business
- Ways to profit from business
 - Start your own business
 - Acquire an existing business
 - Work alongside a business owner in return for equity

Session 5: Investing in Commodities and where to go from here.

Review My Top Investing Guidelines

Commodities:

- What are commodities
- Why invest in them

Wrapping up - What are your next steps

- What asset class interested you. Start there. If it interests you you are more likely to spend the time learning
- Find people who have been successful at what you want to do and learn from them. Most have resources like books you can borrow from the library for free or they are interviewed or featured on podcasts.
- Spend time practising your investing. It took hard work to earn your money. The number one priority is to protect what you have
- How to develop your “rules” for investing.
- Is putting it all on the line a good idea? Protect your assets.
- What to do when it all goes wrong.

The most common ways it goes wrong

Recommended resources

Homework

Please note we intend to make the class interactive and to allow the students to ask questions and dive deeper on any specific aspect of the course content. This may mean that we do not have enough time to cover all the content outlined in this course outline.