FP FINANCIAL POISE

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FINANCIAL POISE WEBINARS
PERSONAL FINANCE & INVESTING FUNDAMENTALS 2.0

Sponsored by: EisnerAmper

SERIES OVERVIEW

This webinar series is intended for the investor who has an intermediate level of investing experience and knowledge. It assumes you know the difference between stocks and bonds, and the difference between investing in publicly traded stock and investing in a mutual fund that, in turn, invests in publicly traded stocks. It assumes further that there are good many things you do not know but which you are quite capable of picking up quickly. The series begins with fundamentals, such as the concepts of alpha and beta and how to approach reading financial statements and financial journalism. The series then turns to look closely at certain alternative investment objects of fascination: investment in VC/PE/HF (private equity, venture capital, and hedge funds) and investment in "hard" assets like real estate. Each episode is delivered in Plain English understandable to business owners and executives without much background in these areas. Yet, each episode is proven to be valuable to seasoned professionals. As with all Financial Poise Webinars, each episode in the series brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. And, as with all Financial Poise Webinars, each episode in the series is designed to be viewed independently of the other episodes, so that participants will enhance their knowledge of this area whether they attend one, some, or all of the episodes.

EPISODE SUMMARIES

EPISODE #1
Alpha, Beta & Stock Picking
September 26, 2017 at 11am CST

You buy some stocks, the market goes up (or down) and your stocks do too. How much of the move of your stocks is due to your savvy as a stock picker (this is alpha) and how much is due to the rise in the market generally (this is beta)? And if you used the advice of an advisor, how much in fees did you pay? These and other basic questions about stock market investing and related topics are the subjects for this webinar.

EPISODE #2

How to Read Financial Statements and Financial Journalism
October 17, 2017 at 11am CST

Journalists -- financial and otherwise -- are not paid to compare carefully the strongest pro- and con-arguments of a proposition. Strong incentives push journalists toward producing loud click-bait. There is no day of reckoning for their views, as there is for investors who do as suggested. Readers, for their part, tend to click what confirms their own biases. How can an investor separate the wheat from the chaff in financial journalism? How can an investor look at the financial statements of a potential investment and decide for herself what the numbers mean? These are the topics for this webinar.

EPISODE #3

Alternative Assets Part 1: Investing in Venture Capital, Private Equity, and Hedge Funds
November 14, 2017 at 11am CST

VC and PE and Hedge Funds: how are these investment modes distinct from each other and from other investment vehicles? Are they for you**?** This webinar explains how such “alternative assets” may make sense for you, depending on your overall portfolio.

EPISODE #4

Alternative Assets Part 2: Investing in Real Estate and Other “Hard” Assets
December 12, 2017 at 11am CST

It is said that real estate and gold are "hard" assets that can insure against inflation or instability, and which do spectacularly well sometimes. But, over time? What role should hard assets play in a portfolio? How is investing in hard assets better or worse than investing in derivatives of hard assets, like futures contracts on gold or platinum?