FINANCIAL POISE

DailyDAC, LLC d/b/a Financial Poise™
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FINANCIAL POISE WEBINARS
PERSONAL FINANCE & INVESTING FUNDAMENTALS 1.0- 2019

ABOUT THIS SERIES

This webinar series is intended for the investor who wants to reduce "unknown unknowns" of investing.

First, a refresher on asset allocation and portfolio theory, i.e., how to array your investments to produce reliable returns over time and temper potential losses.

Then two episodes on the "why?" of investing – the goals one pursues, such as financing family events, retirement, and the fate of your assets when you meet your Maker or Makers or fade to black or whatever. Tax and legal and investment professionals have their uses, but you get more from them when you know what questions to ask and what information to insist on receiving.

The final two episodes turn topical, taking up special topics, including options and private securities (as well as public securities).

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. 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 episodes.

About Episode #1
Basic Investment Principles 101 From Asset Allocations to Zero Coupon Bonds
January 24, 2019 at 10:00 AM CST

There are certain fundamental concepts and terms that every investor should understand. This webinar covers many of them. Some of the many covered: accredited investor; annuity; asset allocation; bonds (including zero coupon bond); capital gain; compound interest; defined benefit v.

defined contribution plan; diversification; inflation; IRA (Traditional v. Roth); Modern Portfolio Theory; mutual fund; net worth; P/E ratio; stock; Prime Rate; rebalancing; registered investment advisor; umbrella insurance; whole life v. term insurance; yield.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

About Episode #2

Goal Based Investing- Planning for Key Life Events

February 21, 2019 at 1:00 PM CST

There is a redundancy in the title for this episode, for one should invest only with one or more goals in mind. This goes along with being the ally of the future version of you – someone you like and hope to admire. This webinar identifies key events and discusses approaches to husbanding our investment dollars.

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About Episode #3

The Legal & Tax Aspect of Investing: Asset Protection; Estate Planning, and Tax Efficiency

March 21, 2019 at 1:00 PM CST

We always hear that estate taxes are avoided by wealthy people with savvy advisors, and we sometimes are told that such taxes fall hardest on less savvy owners of family businesses. Well, legal and tax savvy pays off for anyone gathering assets for any purpose, including long-term goals like estate planning and asset protection.

How not to be penny-wise and pound foolish – this webinar discusses this, and much more.

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