



## **FINANCIAL POISE WEBINAR ONE SHEET PERSONAL FINANCE & INVESTING FUNDAMENTALS 2.0 2019**

### **SERIES OVERVIEW**

This webinar series is intended for the investor who has a beginning to 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.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to you even if you do not have any background in the subject. 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.

### **EPISODE SUMMARIES**

#### **EPISODE #1**

##### **Alpha, Beta & Other Key Concepts**

April 24, 2019 at 2:00 PM 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.

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### **EPISODE #2**

#### **How to Read Financial Statements and Financial Journalism**

May 22, 2019 at 2:00 PM 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.

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### **EPISODE #3**

#### **All About Asset Allocation**

June 19, 2019 at 2:00 PM CST

Asset allocation involves dividing an investment portfolio among different asset categories, such as stocks, bonds, alternative assets, and cash. The particular asset allocation that works best for an investor at any given point will depend largely on the investor's time horizon and risk tolerance.

By investing in a mix of different asset classes which tend to have investment returns that rise and fall under different market conditions (that is, which are non-correlated to each other) within a portfolio, an investor can protect against significant losses. In other words, market conditions that cause one asset category to do well often cause another asset category to have average or poor returns. By investing in more than one asset category, you'll reduce the risk that you'll lose money and your portfolio's overall investment returns will have a smoother ride.

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#### **EPISODE #4**

##### **More About Stocks**

July 17, 2019 at 2:00 PM CST

Investing in the stock market is easy. Doing so successfully is not difficult, depending on your definition of success. But you can also lose your shirt if you are reckless. How do you decide whether to buy stock in a particular company? How do you decide when to sell? How do you construct a portfolio of stocks? What about shorting a stock? Or buying on margin? Or trading in options. This webinar provides a broad introduction into the basics of investing in the stock market.

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