



# HOW TO INVEST

by stock card

## 9:00 AM - ARRIVAL

- Have breakfast, and network with the host and fellow investors
- Meet your hosts, and try a special blend of "How To Invest" coffee :)
- Welcome, overview, agenda

## 10:00 AM - MORNING SESSION

### SESSION 1 - You Are Cut Out To Be A Successful Investor

- Discuss and discover the myths and fictions of Wall Street
- Investing vs. Trading. It matters!
- What kind of an investor are you?
- Feel the power! You are in charge of your money and your investment decisions

### SESSION 2: From Zero Investment To A Portfolio - Part I What is "a good investment"?

- How to discover and validate good investments?
- Personal practice: Take your favorite company and assess whether it's a good investment or not?

## 12:30 PM - LUNCH

Have lunch, and network with the host and fellow investors

## 1:30 PM - AFTERNOON SESSION

### SESSION 3 - From Zero Investment To A Portfolio - Part II

- Choosing a brokerage account; what's all the fuss about the fees?
- Create your personalized investment plan: how much, how many, how often, how to track, and when to sell?
- What you need to know about paying taxes for your investments

### SESSION 4 - Getting Started With Your First Investment

### SESSION 5 - What If Market Crashes?

### SESSION 6 - Next Steps

- Activate your complimentary six months Stock Card Premium access
- Schedule your complimentary follow-up office-hour with the host
- Q&A

## 5:00 PM - Drinks, and Networking With Your Fellow Investors