

Advising the Individual Investor ©

Objective: Many individuals struggle to effectively invest their money. Many often turn to their CPA for advice. When CPAs fail to help their clients, they often increase their own liability exposure. This course will help CPAs to more effectively advise clients about their investments.

What you will learn:

- An overview of the advantages and disadvantages of various asset classes
- How to gather the relevant information from your client
- How to determine your client's true goals
- How to evaluate the level of your client's aversion to risk
- Why asset allocation is important
- Different styles of stock investing
- When bonds or fixed income securities are appropriate
- Factors to consider when investing in real estate
- What important lessons can be learned from history
- How to research potential investments
- Risk factors to consider when making investments
- How to select a financial or investment advisor

CPE: 4 hours

Level: Basic

Category: Technical Consulting

Prerequisites: None