

Investing in a Declining or Expanding Economy ©

Objective: Various types of investments behave differently depending upon the current and anticipated economic and business conditions. Timing is everything! An investment made in one environment may perform extraordinarily well, while the same investment made in a different economic environment may be a disaster. The media reports economic statistics daily. However, many people do not understand what the statistics mean or more importantly their future implications. This course will explain technical concepts in plain English and how they can be used to make better business and investment decisions.

What you will learn:

- The historical performance record of different asset classes
- The key economic indicators to monitor
- Factors to consider in asset allocation
- The implications of a “strong dollar” and a “weak dollar”
- The difference between the budget deficit and the trade deficit, and the implications of each
- Why interest rates rise or fall
- How the trend of interest rates affect different types of industries and investments
- The economic statistics you should monitor for your business
- The difference between fiscal policy and monetary policy
- How the price of oil and other commodities affect economic conditions
- How foreign exchange rates work

CPE: 4 hours

Level: Basic

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis Gerschick