

Investing Fundamentals for the Individual ©

Objective: Many individuals, including CPAs, struggle to effectively invest their money. This course will help any individual to more effectively invest their own money. The instructor will note several obstacles individuals must avoid or overcome to invest successfully.

What you will learn:

- An overview of the advantages and disadvantages of various asset classes
- The relevant information that should be considered
- How to determine an individual's true goals
- How to evaluate the level of the individual's aversion to risk
- Why asset allocation is important
- Different styles of stock investing
- When bonds or fixed income securities are appropriate
- 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

Instructor: Dennis Gerschick