

# *Lessons from the Investment Masters* ©

**Objective:** This course is an overview of different investment styles that can be used profitably. The instructor will explain why very few investors consistently beat the stock market. Some have, however, and as a result they have accumulated enormous wealth. The focus of this course is on the lessons we can learn from some of the legendary investors including Warren Buffett, Peter Lynch, and John Templeton. This course will describe the investment styles used by a number of “investment masters.” The instructor will note the use of stock indexes and technical analysis. Finally, he will summarize various factors that should be considered in selecting an investment advisor or money manager.

## **What you will learn:**

- Can the stock market be beaten over an extended period of time?
- The main obstacles to investing success
- The investment style that was or is used by the “investment masters”
- What the “investment masters” do, that most investors do not
- What pitfalls do the “investment masters” avoid, that most other investors fall into
- The factors that should be considered in selecting an investment manager
- Critical issues that should be addressed in devising an investment plan
- The advantages and disadvantages of stock indexing

**CPE:** 4 hours

**Level:** Overview

**Category:** Technical Consulting

**Prerequisites:** None

**Instructor:** Dennis Gerschick