

# *Stock Analysis & Portfolio Management* ©

**Objective:** This intermediate level course focuses on how to analyze a corporation and its stock in-depth. It will explain how to gather the relevant information, how to analyze it, and what information should be ignored. The instructor will also explain the various factors that should be considered in structuring a stock portfolio.

## **What you will learn:**

- How to analyze a public corporation's financial statements
- Other sources of information about a publicly traded corporation
- The difference between a "good company" and a "good stock"
- Different techniques in evaluating a public corporation's stock
- The key factors to consider in structuring a portfolio
- How to properly diversify a stock portfolio
- Factors to consider in selecting a money manager
- How to evaluate a portfolio's performance
- Pitfalls to avoid

**CPE:** 4 hours

**Level:** Intermediate

**Category:** Technical Consulting

**Prerequisites:** "Investing Fundamentals for the Individual" is recommended but not required.

**Instructor:** Dennis Gerschick