

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.

Learning objectives:

- Assess whether the stock market can be beaten over an extended period of time
- Highlight the main obstacles preventing investing success
- Note the investment style that was or is used by the “investment masters”
- Explain what the “investment masters” do, that most investors do not
- Describe the pitfalls that the “investment masters” avoid, that most other investors fall into
- List the factors that should be considered in selecting an investment manager
- Note the critical issues that should be addressed in devising an investment plan
- Describe the advantages and disadvantages of stock indexing

CPE: 4 hours

Level: Overview

Category: Technical Consulting

Prerequisites: None

Instructor: Dennis J. Gerschick

Code: LFIM