

Manage Your Own Money - 2 Day

Form: <https://forms.gle/cEYXmy7MgeR84wcU7>

Contact: jimmy@moneypangs.com

- Intensive crash-course on market fundamentals
- Manage your own investments and save on fund fees
- Long-term financial planning and retirement portfolio strategies.

Investment Analyst and Manager - 6 Lessons

Form: <https://forms.gle/cEYXmy7MgeR84wcU7>

Contact: jimmy@moneypangs.com

- Immersion on how to research and analyze companies like Wall Street Pros
- Access easy-to-use financial models, tips, and strategies
- Build your own portfolio of stocks



<http://www.moneypangs.com>

Manage Your Own Money (MYOM)

2-day Immersion

Form:

<https://forms.gle/cEYXmy7MgeR84wcU7>

Contact: jimmy@moneypangs.com



Manage Your Own Money (MYOM) Program 2-day Immersion

Day 1- 2.5 Hours

Module 1: Fundamentals of the Markets

- Asset classes and Stock Indices (S&P benchmarks)
- Economic Drivers and Global Central Banks
- Cycles and Sector Rotation: Defensives vs Cyclical
- Types/Style Investing – Active vs Passive/Growth vs Value

Module 2: Types of Investments

- Mutual Funds vs ETFs (Active vs Passive)
- Smart Beta
- Alternatives

Q&A



Key Benefits:

- ▼ Build a solid foundation in market fundamentals
- ▼ Strategies to be your own analyst and fund manager
- ▼ Understand investment fund options to save on fees
- ▼ Creating a long-term plan for retiring early
- ▼ 2 days; 2.5 hours per day
- ▼ Fees: \$899 per person*

*If not satisfied, full money back; no questions asked

Manage Your Own Money (MYOM) Program 2-day Immersion

Day 2- 2.5 Hours

Module 3: Long-Term Investing and Investment Philosophy–

- Creating a Long-Term Plan vs. Short-Term Trading and Speculation

Module 4: Different vehicles – Tax advantaged and non-tax advantaged –

- IRA's, 401K's Roth IRA's: what are the differences and limits
- Stock award/Stock Purchase plans – how to balance the risk
- Savings vehicles for children – 529's, UGMA's, UTMA's, etc.

Module 5: Staying Focused and Committed to Long-Term Plan Goals

- Return vs Risk Analysis: –
- Asset Allocation for Institutions vs Individuals based on your risk factors
- Choices:
 - ETF's (Exchange Traded Funds)
 - Domestic and International ETF's
 - Mutual funds and Individual stocks

Module 6: Behavioral Finance: Staying on track and remain UNEMOTIONAL

Module 7: Your own analysis and research

- Excel models; Valuations; Financial Calculators for Planning

Q&A



Key Benefits:

- ▶ Build a solid foundation in market fundamentals
- ▶ Strategies to be your own analyst and fund manager
- ▶ Understand investment fund options to save on fees
- ▶ Creating a long-term plan for retiring early
- ▶ 2 days; 2.5 hours per day
- ▶ Fees: \$899 per person*

*If not satisfied, full money back; no questions asked



<http://www.moneypangs.com>

Investment Analyst and Manager Program (IAMP)

6 Lessons-

Form: <https://forms.gle/cEYXmy7MgeR84wcU7>

Contact: jimmy@moneypangs.com



Investment Analyst and Manager Program (IAMP)

Hands-on, practical course for:

Stock Analysis and Managing your Own Portfolio!

- ▼ Learn how the ups and downs of the economy affect industries differently
 - ▼ Start with a basic understanding of important financial statements and ratios
 - ▼ Analyze world-renowned companies such as Facebook, Netflix, Nike, Chipotle, or Tesla by understanding exactly how they make money
 - ▼ With our step-by-step model templates, we practice forecasting future sales growth, profits, expenses, and cash flow
 - ▼ Be an amazing stock detective through our stock research methods and asking the right questions in your investigations.
-
- ▼ Learn to diversify and manage your own portfolio.



Key Benefits:

- ▼ Build a solid foundation in market fundamentals
- ▼ Build financial models and gain access to all our templates
- ▼ Practice with live case-studies on popular companies
- ▼ Learn diversification and manage your own stock portfolio
- ▼ 6 Lessons; 2.5 hours each for total of 15 hours
- ▼ Fees: \$1899 per person

***If not satisfied, full money back; no questions asked**



Lesson 1: The Players and Stock Market Overview

- ▶ Outline the players that actually move and control the markets
- ▶ Explore how asset managers make choices and the main methods the best investors use such as top-down or bottom-up investing.
- ▶ Focusing on the stock market, learn how major indices such as S&P 500 and Dow Jones are constructed
- ▶ How to put in your stock orders.



Lesson 4: Value a Stock using Cash Flow like Warren Buffett

- ▶ Learn Free Cash Flow equations
- ▶ Input your own assumptions into our step-by-step Cash Flow financial model templates to calculate your own fair value for stocks.
- ▶ Case Studies may include Amazon, Facebook, Google, Jetblue, Starbucks, Tesla and more.



Lesson 2: Economics of Industry Cycles and Analyzing "Moats"

- ▶ Understand four most important drivers of the economy.
- ▶ Learn which industries perform better or worse during different market and business cycles.
- ▶ Study how business frameworks such as SWOT are used to analyze competition and barriers to entry which Warren Buffett refers to as "moats".



Lesson 5: Be a Detective, Research, Find Great Ideas

- ▶ Form your own unique perspectives and do your own research to make money.
- ▶ Discuss investment strategies of going against the crowd and asking companies the right questions to better understand your stocks.
- ▶ Generate ideas using our research analyst techniques such as screening.
- ▶ Case studies may include Sodastream, Macys, and Netflix.



Lesson 3: Financial Statements with Basic Ratios

- ▶ Learn to decipher financial statements such as income statements and balance sheets.
- ▶ Understand why cash flow is as important as location in real estate.
- ▶ Using ratios, we compare sales growth, profitability, and efficiency with real-time examples across various industries.
- ▶ Case studies may include Apple, Nike, Nintendo, Netflix, Snapchat



Lesson 6: Diversify Portfolios and Eat a "Free Lunch"!

- ▶ introduction to diversification using relatable examples such as Avenger superheroes!
- ▶ Learn how investing in different industries and stocks can increase your chances of making money and lowering your risk at the same time, a "free lunch".
- ▶ Concepts of correlation, risk vs reward, and Sharpe ratios are reinforced with group exercises and examples.
- ▶ **Build your Portfolio!**