



ENTREPRENEURIAL PERSONAL FINANCE COURSE

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Course Description

This course takes you from personal finance core concepts to how to implement your personal investment strategy.

It is built for professionals looking to handle their personal finances like an experienced financial manager. For those in professions that have not traditionally ended with financial freedom, this course provides opportunities to evaluate decisions in a monetary and non-monetary manner. Through learning personal finance core concepts, providing several practical tools and handouts to assess and improve your financial situation, defining your financial goals and receiving your personalized investment strategy to reach those goals, you will be better equipped to achieve your financial freedom sooner.

Learning Goals

- Understand common personal finance pitfalls and learn how to effectively assess your own financial situation and plan to achieve your financial goals
- Have an increased awareness of how your spending pattern and acquisition decisions impact your long-term wealth
- Acquire knowledge of critical finance terms and key theories in entrepreneurial personal finance which are necessary to achieve financial freedom
- Demonstrate an understanding of the relationship between the worker, independent operator, large company owner, and asset manager: from a tax and monetary perspective
- Be aware of the risk-return relationship, your own risk aversion and how different asset classes help you to achieve your financial goals
- See how long it takes to reach your personal financial goals through your individual or the RINO INVEST investment strategy



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RINO INVEST Course Tools and Handouts

- Personal Monthly and Yearly Budget Overview
- Personal Balance Sheet, Income & Cash Flow Statement Calculator
- Financial Goal Setting Creator
- Smart Consumption Cheat Sheet
- Asset Class Cheat Sheet
- Personal Investment Strategy Template
- RINO INVEST Strategy Investment Handout showing you how and until when you can reach your individual financial goals



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Course Content

Lesson	Content	Evaluation
Lesson 1	Introduction	n/a
Lesson 2 <ul style="list-style-type: none"> • Topic 1 • Topic 2 	Personal Finance Core Concepts <ul style="list-style-type: none"> • Assets, Liabilities & Cash Flow • Budgeting & Financial Goal Setting 	Test <ul style="list-style-type: none"> • Quiz • Quiz
Lesson 3 <ul style="list-style-type: none"> • Topic 3 • Topic 4 • Topic 5 • Topic 6 • Topic 7 	Practical Financial Wealth Theory <ul style="list-style-type: none"> • W.I.L.A. Mountain • Opportunity Cost • Core Concepts of Valuation • Psychic vs. Monetary Profit • Smart Consumption 	Test <ul style="list-style-type: none"> • Quiz • Quiz • Quiz • Quiz • Quiz
Lesson 4 <ul style="list-style-type: none"> • Topic 8 • Topic 9 • Topic 10 	Introduction to Investing <ul style="list-style-type: none"> • Relationship of Risk and Return (Part 1) • Risk Aversion Assessment • Relationship of Risk and Return (Part 2) • Asset Classes • Asset Class Subcategories 	Test <ul style="list-style-type: none"> • n/a • Assessment • Quiz • Quiz • Quiz
Lesson 5	Your Own Investment Strategy	n/a
Lesson 6	Course Consultation	n/a
Lesson 7	Graduation (incl. Certificate of Completion)	n/a
Final Exam		