



SECURE YOUR SECURITIES COURSE

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Course Description

This course takes you on a journey from securities market core concepts to actionable next steps on how to start participating in the stock market confidently.

It is built for individuals looking to grow their assets in the most used asset class in this world: securities. Barriers to invest in securities are high for people who lack the knowledge necessary to invest in this asset class. The wave of disclaimers and legal mumbo-jumbo when trying to register an account with a brokerage can seem overwhelming; customers of a financial institution may wonder about the potential for conflict of interest when a bank officer pushes them to invest the bank's preferred securities products.

This course will give you a clear understanding of the securities market so that you are well-prepared to overcome any mental barriers to investing. Applying the tactics learned in this course will significantly increase your ability to achieve positive returns in your securities investments.

Learning Goals

- Know the advantages and disadvantages of the securities asset class and its subcategories (equities, bonds, listed properties, and money market accounts)
- Learn about the different actors in the market from a regulatory (the Securities and Exchange Commission, or SEC), infrastructure (Broker and Exchanges) and market participant (retail and professional investors) perspective
- See how this asset class grew historically and learn from significant past events starting from the Great Depression 1929 all the way to the 2020 COVID pandemic
- See what drives securities prices in the market and how Wall Street decides whether to buy, sell or hold an asset
- Identify the most important Key Performance Indicators (KPIs) of this asset class.
- Know about different investment types such as Real Estate Investment Trusts (REITs), options, futures, Special Purpose Acquisition Companies (SPACs), and Exchange Traded Funds (ETFs)
- Understand different investment strategies such as dollar cost averaging, value investing, growth investing, momentum investing as well as buy and hold
- Know the risks of this asset class and choose the appropriate investment strategies to mitigate them
- Know the federal income tax implications of securities investments.
- Use your newfound knowledge to create actionable next steps and start investing confidently in this asset class.

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RINO INVEST Course Tools and Handouts

- The RINO Investor Cheat Sheet
(Research, Tools, Resources and Mindset Summary)
- Securities Sub-categories Cheat Sheet
- Key Performance Indicator Cheat Sheet
- Investment Strategy Cheat Sheet
- Tax Calculator
- Investor Strategy Quiz

Course Content

Lesson	Content	Evaluation
Lesson 1	Introduction	n/a
Lesson 2	Smart Goals	n/a
<ul style="list-style-type: none"> • Topic 1 • Topic 2 	<ul style="list-style-type: none"> • Your S.M.A.R.T. goals • Risk aversion quiz 	
Lesson 3	Securities Core Concepts	Test
<ul style="list-style-type: none"> • Topic 3 • Topic 4 	<ul style="list-style-type: none"> • Securities and other Asset Classes: What's the Difference? • Subcategories of Securities Asset Class 	<ul style="list-style-type: none"> • Quiz • Quiz
Lesson 4	Overview of Investor Strategies	Test
<ul style="list-style-type: none"> • Topic 5 • Topic 6 	<ul style="list-style-type: none"> • Investor Strategies and their Differences • Quiz: Which Investor Strategy suits you? 	<ul style="list-style-type: none"> • Quiz • Quiz
Lesson 5	Choosing the right Securities	Test
<ul style="list-style-type: none"> • Topic 7 • Topic 8 • Topic 9 	<ul style="list-style-type: none"> • Key Performance Indicators • Risk Management • Tax Implications 	<ul style="list-style-type: none"> • Quiz • Quiz • Quiz
Lesson 6	Your Own Investment Strategy	Test
<ul style="list-style-type: none"> • Topic 10 • Topic 11 	<ul style="list-style-type: none"> • Your Strategy • Tools, Resources and Mindset 	
Lesson 7	Bonus lesson	Test
<ul style="list-style-type: none"> • Topic 12 • Topic 13 • Topic 14 • Topic 15 	<ul style="list-style-type: none"> • The Securities Playing Field • The Value of a Security • Example of Warren Buffett • Options & Derivatives 	<ul style="list-style-type: none"> • Quiz • Quiz • Quiz • Quiz
Lesson 8	Course Consultation	n/a
Lesson 9	Graduation (incl. Certificate of Completion)	n/a
Final Exam		