



INVEST FOR SUCCESS

Grow wise. Grow Wealthy.

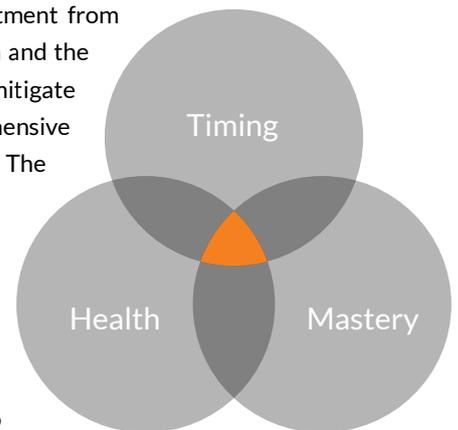
UPCOMING COURSES

Summary

Invest for Success, our two-day signature training course, examines how to invest wisely in healthy companies to generate passive income and capital growth. You'll learn how to protect your investment from the usual novice traps and identify unusual market gyrations for example, the 1987 crash and the 2007 GFC. By following the Wealthwise method, you will be able to anticipate, prioritise, mitigate and manage financial events and confidently turn them into opportunities. This comprehensive workshop will give you the necessary foundation to build wealth in the stock market. The **Wealthwise Sweet Spot** is where market timing, company health and risk mastery meet.

Program Objectives

The course is intended to improve the participants' knowledge and skills to gain proficiency in the area of analysing and investing in the stock market. The program will demystify the markets and show how to manage risk. Jam packed with key information, the program explains how to make your money work harder for you. By learning how to integrate psychology, with the **Wealthwise Sweet Spot** and the **Wealthwise Fortress Model**, graduates are able to:



Wealthwise Sweet Spot

- Demonstrate knowledge, skills and concepts related to the terminology and techniques used in the stock market to analyse and invest in stocks.
- Select the appropriate times to buy, take profits and become more skilful, confident investors, maximising potential for market returns.
- Identify healthy growing companies, and make sound market decisions.
- Practice the Wealthwise methodology and gain competence during and after the program before entering the live market.

Course Outline

This comprehensive workshop includes two days of intensive, step-by-step instruction, in a supportive learning environment. It provides a proven methodology and when necessary personal coaching to ensure understanding and practical application, including:

- Assessing and strengthening your approach to investing wisely in the markets
- Recognizing and avoiding the common investor traps
- Understanding market psychology and its impact on your personality and investing style
- Analysing both technical charts and fundamental data
- Identifying clear signals for entry, exit and profit taking
- Turning uneducated gut feel into strategy formulation and execution
- Managing the consequences of market fluctuations and trends changes
- Building a strong, flexible stock portfolio full of quality stocks

WEALTHWISE EDUCATION CURRICULUM

SUPER TRADERS

ADVANCED OPTIONS

OPTIONS FOR SUCCESS

INVEST FOR SUCCESS

FINANCIAL WISDOM

"Invest for Success provides an excellent yet easily understood introduction to successfully investing in the stock market using a disciplined methodology and sound risk management principles. In addition to the outstanding presentations the workshop has been designed using sound educational principles so that the participants understanding of the material is continually tested and reinforced. To ensure that the information is successfully applied, a post workshop plan helps direct the participants so that they can gain the confidence to 'go it alone.'"

B Quinn, Consultant

"Great to get some detailed analysis on stocks. Good appreciation of the macro view. For honest and objective stock market education you need to get involved with David & Kate at Wealthwise."

T. Andrighetto, Business Owner

Why Wealthwise Education?

This is where wise investors are created. At Wealthwise Education, you will prepare for a brighter financial future. You will develop strategic skills and gain insight to better understand and handle complex financial markets.

FOCUS & CURRICULUM - our only focus is investing and trading in the financial markets via stocks and options. Our curriculum includes 5 courses suitable for all experience levels ranging from novices to high net worth seasoned investors. Mentoring programs are available for our advanced graduates.

MARKET EXPERTISE - we deliver each course personally sharing our 30 years of market experience. With David's insight for the markets and Kate's passion for education and customer care, there is no other program that can offer you the Wealthwise unique perspective and life experience.

SUPERIOR LEARNING EXPERIENCE - We take a lot of care to ensure the structure of our courses provide an optimal learning experience for the participants. The combination of quality content, world-class educators and small classes ensures everyone has the opportunity to interact, ask questions and get clarity. There is no need to learn the hard way – you gain from our distilled wisdom and leave with a clear understanding and ability to control your finances.

WISE PRINCIPLES - Our main aim is to provide clear, simple, yet wise investing principles. We combine our own experiences with wisdom from the masters like Warren Buffett, George Soros and Sir John Templeton. This content rich, intensive and comprehensive program will exponentially expand your ability to understand and profit in the stock market.

DYNAMIC TEAM - David Novac & Kate Sheehan saw the need for independent investor education and co-founded Wealthwise Education in 1997. Combining David's passion for the stock market and Kate's for education, they have grown Wealthwise into one of Australia's leading stock market education companies. David is a highly sought after keynote speaker for domestic and international events. He is a regular co-host on Sky Business and a popular presenter for the Australian Investors Association, Australian Shareholders Association and other executive organisations. David Novac's formal qualifications include: RG146 Compliant under FSRA and an Accredited Derivatives Advisor, Level 2 (ASX). Kate is RG146 Compliant under FSRA and Cert IV in Training & Assessment and loves seeing graduate's skills and confidence grow. She has a wealth of experience structuring training and offers solid ongoing support to Wealthwise graduates. Wealthwise have presented in Australia, NZ, USA, Europe, Malaysia, Indonesia, China, Singapore and Hong Kong. David & Kate enjoy delivering small, engaging workshops and supporting their graduates to success.



Educators: Kate Sheehan, David Novac

Participant Mix

This program is intended for people who want to invest directly in the stock market or manage their own superfund (SMSF), and for those who wish to be more informed when speaking to a financial advisor or fund manager.

Typical participants include executives, professionals, small business owners, tradies, farmers and anyone with the desire to focus on their finances and investments. Both novice and seasoned investors are encouraged to attend – there is significant learning for all levels of experience.

Further learning

Completing this course will also form the foundation for further learning about leverage, protecting your portfolio and generating additional income by using Exchange Traded Options.

Registration

Online Registration Process – Please visit [upcoming courses](#) or www.wealthwiseeducation.com or just call our office. We encourage you to book early to take advantage of Early Bird savings. No prerequisites. **Tuition** – includes a 2 day workshop, comprehensive workbook and manual, meals, free access to Wealthwise Graduate Forum online. **Cancellation policy** - is outlined on the registration page.



Wealthwise Fortress Model turns the Typical Western financial model on its head and builds a strong foundation for wealth security.

wealthwise
education



📍 Wealthwise Education Pty Ltd
PO Box 6094, Pymble NSW 2073, Australia
✉ info@wealthwiseeducation.com
☎ +61.2.94889900
🌐 wealthwiseeducation.com

Connect with us
🌐 @wealthwise-education
📘 @WealthwiseEducation
📺 @wealthwiseeducation
🐦 @wealthwiseed

Corporate Authorised Representative (281921) of Zodiac Securities Pty Ltd (AFSL 398350)

In accordance with Wealthwise Education policy, Wealthwise Education does not discriminate against any person on the basis of race, colour, sex or sexual orientation, gender identity, religion, age, national or ethnic origin, political beliefs or disability in admission to, access to, treatment in, or employment in its programs and activities. Workshops and programs, dates and tuition are subject to change.

©2015 Wealthwise Education Pty Ltd.