

# INVESTING FOR SUCCESS

## LEVEL 1 & 2

### INVESTING FOR SUCCESS LEVEL 1

This interactive and engaging course will cover important principles for successful investing, as well as current market conditions and investment considerations. Topics include: capital markets, picking stocks, investment strategies, mutual funds, and taxation.



**COURSE: PIW 132 | 15 Hours | \$345 + GST**

**012** | January 28 - March 11 | Monday | 6 - 8:30 pm | Downtown

**013** | April 1 - May 13 | Monday | 6 - 8:30 pm | Downtown

### INVESTING FOR SUCCESS LEVEL 2

Explore further the securities markets and learn pricing and trading concepts for different types of financial instruments. A basic understanding of stocks, bonds and mutual funds will be assumed. Topics covered include pricing and trading techniques in fixed income, equity, derivatives, and modern portfolio theory. Discuss the benefits and challenges associated with portfolio construction. This course is intended for students who have taken PIW 132 Investing for Success Level 1 (formerly titled Personal Investment Strategies) or equivalent.



**COURSE: PIW 142 | 20 Hours | \$345 + GST**

**006** | January 29 - March 5 | Tuesday | 6 - 8:30 pm | Downtown

### INSTRUCTOR

UCalgary alumnus, David Sherlock is an experienced investment professional, specializing in developing quantitative North American equity models. He has also held roles in investment research and wholesaling, and for more than a decade, has been a portfolio manager serving high net-worth families. He is also an experienced instructor teaching Canadian Securities and various investment management courses. In 2012, he was the winner of the Globe and Mail Stock Picking contest. David holds a BA in Economics and Political Science, and several designations, including Canadian Investment Manager, Personal Financial Planner, Financial Management Advisor, Associate Institute of Canadian Bankers, and Fellow of CSI designations.

