

# INVESTING FOR SUCCESS

## LEVEL 1 & 2

### INVESTING FOR SUCCESS LEVEL 1

We 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**

025 | October 11 - November 15, 2022 | Tuesday | 6 - 8:30 pm | Online Synchronous

026 | January 25 - March 1, 2022 | Wednesday | 6 - 8:30 pm | Class

027 | May 2 - June 6, 2023 | Tuesday | 6 - 8:30 pm | Online Synchronous

028 | May 15 - June 26, 2023 | Monday | 6 - 8:30 pm | Class

### 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 | 15 Hours**

010 | January 31 - March 7, 2021 | Tuesday | 6 - 8:30 pm | Online Synchronous

### 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.

