INVESTING FOR SUCCESS
LEVEL 1 & 2

INVESTING FOR SUCCESS LEVEL 1

Learn 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.

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COURSE: PIW 132 | 15 Hours
022 | Oct 19 - Nov 23, 2021 | Online Synchronous | Tuesday | 6 - 8:30 pm
023 | Jan 26 - Mar 2, 2022 | Online Synchronous | Wednesday | 6 - 8:30 pm
024 | May 3 - Jun 7, 2022 | Online Synchronous | Tuesday | 6 - 8:30 pm
025 | Oct 11 - Nov 15, 2022 | Online Synchronous | Tuesday | 6 - 8:30 pm

INVESTING FOR SUCCESS LEVEL 2

Further explore 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 or equivalent.

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COURSE: PIW 142 | 15 Hours
009 | Feb 1 - Mar 8, 2022 | Downtown Campus | Tuesday | 6 - 8:30 pm

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 nearly two decades, has been a portfolio manager serving high net-worth families. He is also an experienced instructor teaching Canadian Securities and various investment management courses. . He was a past winner of the Globe and Mail Stock Picking contest, and he is regularly quoted in the media as an expert in the field. 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.

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CONTINUING EDUCATION