

Derek Miller, a seasoned financial and investing expert with over two decades in the financial services industry aims to equip the participants of this course with professional financial planning and investment strategies to achieve financial goals. Whether you are a seasoned investor or a complete beginner, the information contained in this course is critical to financial and investment success

What You'll Learn

- **1. The History and Evolution of the Stock Market:** Understand its creation, the role it plays in global economies, and its impact on individual wealth.
- **2. Asset Allocation:** Master the art of balancing risk and reward to maximize returns, using the same strategies as major banks and brokerage firms.
- **3. Choosing the Right Account Type:** Guidance on selecting the best investment accounts (IRA, Roth IRA, 401(k), etc.) for your financial situation.
- **4. Creating a Financial Plan:** Develop a dynamic financial plan that adapts to life's financial challenges and opportunities.
- **5. Evaluating Current Investments:** Assess and optimize your investment portfolio for better performance.
- **6. Account Setup and Trading:** Practical steps for setting up an account and executing trades.

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COURSE FEATURES:

- Interactive resources, including video links to comprehensive guides on asset allocation, financial planning, choosing investments, and more.
- Insights into evaluating investments, including a detailed breakdown of ETFs, managing funds, and understanding fees and daily volumes.
- A guide to account setup, placing trades, reviewing, and rebalancing your financial plan and investment portfolio.

INCLUDED WITH YOUR COURSE:

- **1.** A comprehensive 70-page workbook designed to guide you through each step of the financial planning and investing process.
- **2.** Over seven hours of detailed tutorials, featuring instructions for creating your financial and investment plans, complemented by perpetual access to video links for all tutorials.
- 3. Access to budgeting worksheets to aid in managing your finances.
- **4.** The opportunity for personalized, one-on-one coaching sessions with me to refine your financial and investment strategies.
- 5. Direct email access to Derek Miller for any queries you might have.

BE SURE TO ASK ABOUT
OUR PACKAGES THAT INCLUDE BOTH COURSES, ACCESS
TO OUR WEEKLY UPDATE, AND 1 ON 1 FINANCIAL AND
INVESTMENT SESSIONS.