

# Investment Basics

## A Guide to Your Investment Options

This is one of several workshops to provide the attendee with an understanding and application of the essential planning topics necessary to manage your financial life. This information will provide you with a comprehensive financial foundation, along with advanced planning strategies to help you plan for a successful financial future.

**The following Investment Basics subjects will be covered:**

### Investment Fundamentals

- ✓ *Effect of Inflation*
- ✓ *The Effect of Compounding*
- ✓ *Identifying Goals and Time Horizons*
- ✓ *Risk Tolerance*
- ✓ *Relationship Between Risk & Return*

### Investment Options

- ✓ *Types of Investments*
- ✓ *Cash Alternatives*
- ✓ *Bonds, Stocks, Mutual Funds*

### Investment Methods

### The Role of a Financial Professional

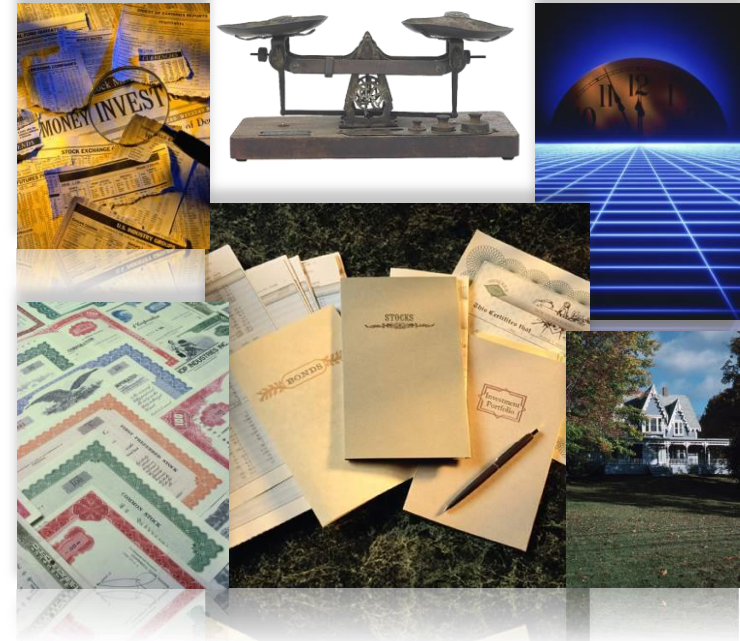
### **Instructor: Michael J. Aluotto, CRPC®**

Mr. Aluotto is President and Private Wealth Manager of Vertex Wealth Management and has managed clients' wealth for more than 35 years. He is a Chartered Retirement Planning Counselor® and an Investment Advisor Representative, and earned his Bachelor of Science degree from Cornell University.



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## ***What Is Investing?***



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