



## Session #1: Investment Foundation

- Get clear on your financial picture: liabilities, income, and assets
- Expand your investor mindset
- Calculate your net worth
- Determine your financial values
- Map out your monthly cash flow
- Learn the building blocks to create passive income



## Session #2: Stock Market

- Learn how the stock market works
- See the power of compounding returns
- Clarify the different investment selections you can make
- Evaluate your investment accounts to fill any gaps
- Start mapping out your portfolio goals



## Session #3: Asset Allocation

- Understand the 3 ways to invest in the stock market
- Know how to take advantage of taxes in your investment accounts
- Determine your risk tolerance
- Get clear on your asset allocation and diversification
- Learn how to select investment funds



## Session #4: Real Estate Investing

- Learn about different strategies to earn a return on real estate
- Know the different financing options available
- Understand how to analyze a property's cash flow
- Consider the real estate investments that fit your overall portfolio



## Session #5: Business Investing

- Get acquainted with the cashflow quadrant
- See how to become an accredited investor
- Learn about crowd equity, angel and venture capital investing
- Define your top investment goals
- Build an investment plan to reach your goals



## Session #6: Accountability Systems

- Connect *Factora's Financial Framework* to see your path to financial freedom
- Get accountable to your goals
- Set up ongoing automations to build lasting wealth
- Know how to continue your financial education beyond the Wealth Circle