

Investment Basics

A Guide to Your Investment Options

Date: November 20, 2013/ Time: 6:30 pm

Location: Mid-Island Y JCC

- **45 Manetto Hill Road**
- **Plainview, NY 11803**

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

About the Instructor: Mr. Aluotto is the President of Vertex Wealth Management, LLC and is an independent Private Wealth Manager with the broker dealer First Allied Securities, Inc.



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What Is Investing?



Reserve your seat:

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