



FAIRTREE

# How to Navigate Your Investment Journey

## Course Outline

If you are new to the world of investments, it might seem like navigating your way through a dense financial forest: overwhelming and somewhat intimidating. There would be different routes to take, uneven terrain and unusual elements lurking in the shadows.

To assist you in conquering this unfamiliar ground and growing your own financial forest, Fairtree Navigate has designed a short-course called: How to start your investment journey.

Whether you are new to the world of investments and don't know where to start or consider yourself to be a seasoned investor who want to enhance your investing skills, this course is for you, taking you from roots to results.

## Session Breakdown



### Session 1 - Unpacking the Forest

- Introduction: The elements of investing
- Behavioural finance
- Soil - Your financial reality (Childhood, Current Environment, Emotions, Values)
- Seeds - Your money personality (Stewer, Stasher, Saver, Shopper, Super-Spender, Shunner)
- Roots - Your financial literacy (Take control, Educate yourself)





## Session 2 - Principles, Products and Projections

### Principles

#### Unpacking spending

- The secret to financial success
- Your Cash Flow
- Your Financial Blueprint

#### Investment Concepts

- Investments, Contributions, Time, Compound Growth
- Setting your financial savings goals
- Risk profiling
- Saving versus investing

### Products

- Emergency Fund
- Retirement Planning

### Projections

- Compound Growth and Forecasting

## Session 3 - Achieve your investment goals

- Street smart financial decisions
- Choosing a suitable investment product (Unit Trust, Tax-Free Savings Account, Retirement Annuity)
- Selecting appropriate investment funds / solutions
- Active Investing versus Buy-and-hold investing
- Asset classes (Equities, Property, Fixed Income, Cash and Cash Equivalents & Alternatives)
- Key investment concepts (Asset allocation, Risk and return, Diversification, Correlation)
- Practical application to achieve your financial goals (Investment goal to portfolio construction)
- Fairtree Funds and Solutions

## Access this series.

Keep an eye on our social media sites and Navigate Platform to access this informative series.

