

## ShareOwner's Growth-Stock Mentorship Course Description & Additional Information

### Description

Do you want to know more about the stock market and would you like to try it out with a modest amount of money? A student studies with his/her mentor for three months to design a 20-stock "Take-Home" portfolio for personal use in a retirement, tax-free savings or other account.

Before using the portfolio at home, the student gives it a nine-month, true-to-life "Tryout" by investing a total of from \$10 – \$100 in each of his/her portfolio choices. Tryout accounts are administered by Canadian ShareOwner Investments Inc. a member of the Investment Industry Regulatory Organization of Canada and are covered under the Canadian Investor Protection Fund.

The twelve-month mentorship includes: course text; stock-study software (pc) and database of 6,000 companies; three video lessons (buying, portfolio building and selling); mentor-led lesson tutorials (monthly); top-stock research reports (bi monthly); mentor-led case studies (monthly); mentor-supervised take-home portfolio; and, commission-free scheduled trading during the portfolio tryout.

Continuous enrolment. Cost: \$595

### Additional Information

#### Learning Outcomes

Upon completion of this 12-month Mentorship, a student will have received instruction and practical experience in:

1. Recognizing high-quality growth stocks trading at an attractive price.
2. Knowing how to construct a growth portfolio, prudently.
3. Recognizing troubled companies to avoid putting in a portfolio.
4. Knowing when to consider selling a stock.
5. Understanding a stock's risk.

#### Learning Resources

**Text:** Bart, J.T. *Investing in Growth Stocks* (2<sup>nd</sup> ed.). ShareOwner Education Inc., 2008.

**Software:** *Stock Study Guide*, ShareOwner Education Inc. 2001

#### Teaching and Learning Methodology

The Mentorship's educational content has been developed for investors from a wide variety of educational backgrounds.

1. **Video Lessons (60 minutes).** Three lessons (one each on buying, portfolio building and selling) are available online (24/7) which allows for a continuous intake of students who can learn at their convenience.

Reading assignments from the mentorship's text and a PDF of a lesson's illustrative materials (15-20 pages) enhance the education available in the lessons.

**2. Mentor-led Lesson Tutorials (60 minutes).** These review and summarize each lesson's content.

As well, tutorials provide students with the opportunity to discuss lesson content with the mentor and to have their questions answered.

Tutorials are held on the second Wednesday of each month from 4-5 p.m. ET. They are also recorded for later viewing (24/7) by students unable to attend the scheduled event. (Three qualifying hours)

**3. Mentor-led Case Studies (60 minutes).** Twelve case studies involve a discussion of an assigned research report (7-10 pages) about promising stocks in a currently interesting sector of the economy. Preparing for a case study requires a student to use the mentorship's software and database to replicate the report's research for one of the featured stocks.

Students have the opportunity to discuss their research with the mentor and to have questions answered.

Case studies are held on the third Wednesday of each month from 4-5 p.m. ET. They are also recorded for later viewing (24/7) by students unable to attend the scheduled event.

**4. Planning the Take-Home Portfolio.** Students prepare and submit their plan for a portfolio for personal use in a retirement or other investing account. This activity includes:

- (a) Selecting a diversified portfolio of 20 high-quality growth stocks and exchange-traded funds;
- (b) Deciding on a 'comfortable' amount of money to invest in the portfolio (\$1 – \$100 per security);
- (c) Deciding how to divide the money among the portfolio selections; and,
- (d) Deciding on the interval between portfolio purchases (typically, monthly or quarterly) during the Portfolio Tryout period. A student receives the mentor's written commentary on his or her plan and adjusts it accordingly.

**5. The Portfolio Tryout.** After finalizing their portfolio plan, students make initial purchases of their 20 portfolio choices.

During the next nine months, student use the mentorship's software and database to monitor the growth, financial, operating and pricing fundamentals of their choices.

Along the way, students make the decision to proceed with their second round of stock purchase, as scheduled, or modify their plan in response to market or company-specific developments. For example, students may decide to pause purchasing of a stock(s); to sell a stock(s); and/or to introduce a new stock(s) into the portfolio.

**Method of Evaluation.** At the conclusion of the Tryout Period, students receive a Performance Certificate reporting their portfolio's performance in relation to the TSX Composite Index and the S&P 500 Index.