

ShareOwner Education Inc.

Growth-Stock Mentorship for Superior Returns

Take-Home Portfolio

The Tryout

The Tryout Room



Mentor-Supervised Take-Home Portfolio

Students choose a three-, six- or nine-month Mentorship during which to design a 20-stock Take-Home Portfolio for personal use in a retirement savings plan or other investing account.

The mentor reviews and comments on a student's proposed design. Following receipt of that feedback, students give their finalized design a true-to-life tryout.

'Take-Home' Portfolio	
No minimum purchase	
\$__	Royal Bank
\$__	Imperial Oil
\$__	Canadian Tire
\$__	Manulife
\$__	Suncor
\$__	Google
\$__	TSX 60 (ETF)
\$__	McDonald's
\$__	Apple
\$__	Other Names*

*Choose your portfolio from ShareOwner's selection of 160 Growth Stocks and 30 ETFs

Trying Out The Take-Home Portfolio

Students are under no obligation to do so, but they can try out their Take-Home Portfolio using a modest amount of their own money.

Generally, a student can invest \$1 – \$100 in each of the 20 stocks included in his or her Take-Home Portfolio. For example, a student might choose to buy \$20 worth of each of the portfolio's 20 stocks.

ShareOwner's unique Portfolio Building Service lets investors use dollar-based buying to purchase whole and fractional shares of a stock (to four decimals).

So, investing \$20 in ABC Bank (recent market price \$52) would result in purchasing 0.3846 shares for the student's 'Tryout Account'.

Tryout Period

Students enjoy a nine-month period to try out their Take-Home Portfolio in the stock markets of North America

All online buying and selling for the portfolio during the nine-month tryout period is without charge.

Investor Protection

Whole and fractional shares of the portfolio's stocks are credited to a student's Take-Home Portfolio's 'Tryout' Account at our trading affiliate:

Canadian ShareOwner Investments Inc.



**Member of the Canadian
Investor Protection Fund**



**Member of the Investment
Dealers Association of Canada**

Candidate Securities for Take-Home Portfolios

**160+ large-company growth stocks
from 16 leading business sectors**

Banking

Scotiabank
TD Bank
Royal Bank
Bank of America ...

Consumer

Canadian Tire
Shoppers Drug Mart
McDonald's
Procter & Gamble ...

Technology

Research in Motion
Rogers
Google
Oracle ...

Insurance

Great-West Life
Manulife
Sun Life
Berkshire Hathaway ...

Industrials

CN Railway
SNC-Lavalin
Boeing
Honeywell ...

Health Care

Express Scripts
Johnson & Johnson
Merck
Quest Diagnostics ...

**30+ exchange-traded funds (ETFs) that
track leading business sectors and stock
market indexes from around the world.**

Canada

Composite Index
TSX 60 Index
Financial Index
Dividend Index
Energy Index
Materials Index
Gold Index...

International

Emerging Markets Index
International Index
China 25 Index
Japan Index
Latin America Index
Europe Index
Germany Index...

United States

Dow Jones Industrials
S&P 500
NYSE 100 Index
Nasdaq Index
Aerospace Index ...

Bond Market Indexes

Cdn Bond Market
CdnReal Return Bond
Cdn Short Bond
U.S. Aggregate Bond
U.S. Treasury Bond ...

Experiencing the Emotions of Investors

Investing a modest amount of money in your choice of growth stocks tests your investing skills in the dynamic environment of a daily-changing stock market.

Investing with your own, rather than 'play' or 'virtual' money has the unique advantage of letting you experience your emotional responses to the daily 'ups' and 'downs' of stocks that you have chosen.


Portfolio Performance

Each month, ShareOwner provides students with a report showing the interim performance of their Take-Home Portfolio compared to that of the leading North American stock market indexes: the TSX Composite, the Dow Jones Industrials, the Nasdaq 100 and the S&P 500.

At the conclusion of the portfolio tryout experience, ShareOwner provides each student with a Performance Certificate reporting his or her portfolio's performance in relation to that of other students.

ShareOwner Education Inc.

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