

InvestNow Clubs Memorandum

Date: March 15, 2021

RE: Session #3 Agenda

1. Review of second session
2. Review performance of equities in our Robinhood account
3. What should we invest in?
 - a. Stocks
 - i. Technology
 - ii. Consumer
 - iii. Industrial
 - iv. International
 - v. Other
 - b. Mutual Funds
 - c. Other types (bonds, etc.)
4. Risk
 - a. Types
 - b. Impacts of various decisions about risk
5. Types of Investments
 - a. Stocks, Bonds, Mutual Funds, Bank Accounts, Real Estate, Operating Companies
 - b. Diversification
 - c. Return on Investment (ROI)
 - i. Example of bank account
 - d. Capital: Debt vs. Equity
 - i. Capital Stack for a home or business example
6. Stocks
 - a. Public vs. Private
 - b. Brokers
 - i. How they work
 - ii. Survey Robinhood Account
 - c. Nike, Google, Caterpillar
 - d. How to understand and research stocks

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i. Shares (project), Pricing, Market Value, Dividends, Risk & Return

7. Action Items

- a. Read Chapters 5, 6, and 7. You can read more. Mark up the book! Take notes.
- b. Write down 5 questions. Try to solve them with others in the class and tell us what you learned.
- c. Discuss Shark Tank episodes.
- d. Go to Robinhood or Yahoo Finance and decide on a stock you'd like to invest in

When watching Shark Tank, please fill out a form like this for 2-4 companies. Here's an example:

	Company	What they do?	What is offer?	Who invested?	Final Terms
1	Jump-o'-riffic	They sell devices that make you jump 10 feet high.	10% of company for \$100,000	Mr. Wonderful.	\$75,000 debt at 8% interest rate; \$50,000 for 7% ownership