

Get more out of share investing

Share Investment Seminar



Introduction to Investing and Shares

Sat 13 October 2018 | Sun 14 October 2018

The *Introduction to Investing and Shares* seminar is an independent educational course presented and delivered by the NZ Shareholders Association.

The course is designed to give people an overview of different investing options. For people new to share investing, it will explain where to start, what's involved in managing a share portfolio and useful strategies to follow. The seminar is also relevant to existing share investors, who are wanting to refresh their knowledge, lift their confidence or get information about other options for diversification.

Course outline

This course follows a seminar delivery approach where the information presented by the course leader is open to discussion and questions are encouraged. Feedback from previous courses NZSA has run shows that this format provides a robust and easy to follow way to build knowledge in this field.

The course assumes no prior investment knowledge, and includes a comprehensive workbook with notes from the course. The course runs over four hours, split into a morning and afternoon sessions. Topics cover are:

Investing for your future (10.00am – noon)

- Choices, Risks and Rewards
- Asset classes and allocation
- Measuring performance
- Direct share investment
- Managed funds and fees

Sharemarket basics (1.00 – 3.00pm)

- The benefits of owning shares
- Useful investment strategies
- Get started. Buying and selling
- Four key financial ratios
- Getting information

Course leaders

The course is being jointly led by Wellington Branch Chair, Martin Dowse and Wellington Committee member, Phil Kelliher. Both have a wealth of knowledge from management of their own investment portfolios. Martin has a bachelor of science with honours in geology from Victoria University of Wellington and was co-owner of Accounting Practice Dowse Murray. Phil brings experience as a sharebroker, qualified financial advisor and as an investment manager responsible for \$580M of investment funds for Public Trust.

Course Costs

NZSA Members \$ 50
Non members \$100
(Includes a comprehensive workbook)

SPACES WILL BE LIMITED | REGISTRATION ESSENTIAL

Two options to choose from: Sat 13 Oct or Sun 14 Oct 2018
Register at www.nzshareholders.co.nz

Course Venue: NZX Offices | Level 1, 11 Cable St | Wellington

