

Michael P. Loftus

Advanced Investments, Markets, Investing & Planning

Course Plan – Subject to change, based on where we are in cycle and markets

Class #1 – What’s happening now - Update on current events that affect markets. Overview – Understanding Market Cycles, what are they, how they affect investment decisions. A Macro Economic View. Technical Analysis - Charts - Utilizing Charts to make better decisions

Class #2 - Update on current events that affect markets - Deep dive into charts, will provide handouts with all terminology. Recommend books that help in decision making process.

Class #3 - Update on current events that affect markets - Building a better portfolio based on cycles and trends. Why taking profits is a good thing and why standard asset allocation, buy hold is outdated.

Class #4 - Update on current events that affect markets - Planning Strategies - Tax Planning in Retirement, Legacy and Estate Planning Strategies

Class #5 - Update on current events that affect markets - Review Cycles, Charts, how they are being affected by current d