

“No Lose” Options Strategies Workshop

We Open New Doors for your Stock Investing

Syllabus

Doug Morse, MBA, MA
valueinvestingvalets@gmail.com

Workshop Description

What?! A “no lose” options strategy? That title may sound outrageous because most people have been taught that stock options are risky and complicated and a way to lose money quickly.

That is simply not true. Reasonable options strategies can be learned and implemented by an individual investor willing to learn. You have the ability. You just need an experienced guide to teach and support you.

This workshop will demonstrate how to use stock options (Puts and Calls) *responsibly, conservatively, and understandably* to enhance portfolio returns.

The workshop will integrate stock valuation with the use of Puts and Calls to lower your risk and improve portfolio results. Options-savvy investors have a very powerful arrow in their quiver to take control of their financial future (and yes, these are “no lose” strategies because we use options so that they achieve your goal no matter what the market does. Seriously.)

Intrigued? Then this workshop is your chance to see for yourself and decide if you have appetite for more.

At a minimum you have learned something —and you will sleep well at night along the way.

The workshop integrates the concepts of stock valuation and options strategies:

Stock Valuation

- a. The workshop will use stock valuation methods to determine what a share is worth compared to the current stock price to spot options opportunities.

Using Stock Options - Puts and Calls - When You Know the Value

- a. Once we know the value of a share compared to the price, we can implement understandable options methods to juice return.

Workshop Learning Goals

At the end of the workshop, participants will know how to:

- Use valuation methods to determine what a stock is worth
- Apply the valuation result to the stock price to spot opportunities to use options
- Identify the key parts of an options chain
- Practice selling Puts and Calls to enter a position, exit a position, or create “double dividends” income for your account

Workshop Structure - 2 Interactive Zoom Sessions

2 workshop sessions will be conducted over 2 evenings via Zoom. (Consecutive evenings or at least the same week).

Session will begin at 7:30 pm CST and last 90 minutes. Sessions will start on time, follow an agenda, and end on time. Whether sessions are recorded is to-be-determined.

Sessions will be highly interactive, real-time, and deal with real companies and real stock market action – so participants must have microphones and video cameras on.

To maximize our interactive time together during each session, participants will be required to watch brief videos (8-15 minutes each) prior to Session 1. (There is no video for Session 2).

SESSION 1 “When You Are Willing To Sell Your Shares for Profit in the Future: Selling Calls”

Before Session 1, participants must take action:

1. Get access to ValueLine Investment Survey via an urban library or buy a subscription.

2. Study videos:

Video O1: The concept: How Call options help when you know the value of a stock.

Video O2: How Put options help when you want to buy a share of stock even cheaper.

Session 1 Agenda (90-minute live session)

Session Purpose: Practice using options when you know the value of a share of stock.

45 minutes: Live session with live market data and real-time examples selling Calls.

-What timeframe should I use?

-What strike price should I pick?

-How do I analyze the best strategy?

-How do I calculate return on investment using Call options?

5 minute Break

35 minutes:

-Participant chime in: group select a company and we work through a valuation together and how we might sell a Call.

5 minutes:

-Discuss goals for Session 2

Adjournment

####

(see next page for Session 2 Agenda)

SESSION 2: “Getting Paid to Buy Stock at a Lower Price”

Session 2 Agenda (90-minute live session)

Session Purpose: Using a company valuation, learn how to sell a Put to get paid to buy stock at a lower price.

45 minutes:

-Q+A from last session

Real-time demonstration of valuation and selling a Put.

45 minutes:

-Group select a company and practice valuation process and demonstrate selling a Put

5 minutes:

-Wrap Up - Next Steps You Could Consider

Adjournment

###

Facilitator Contact Information

Doug at valueinvestingvalets@gmail.com

Reminders:

- My investing passion makes me preach, my mistakes help me teach
- I am not a licensed financial advisor
- I do not know your financial circumstances
- I am offering no advice whatsoever
- All information presented is solely for entertainment
- Your investing decisions are yours and yours alone - true financial freedom!

End###