

OptionsWest.com

Courses, Classes, Trading Tools and Services

Courses and Classes

The first step for California based clients is to take the Free Starter Class. This class shares the concepts and skills needed for successful investing. Local clients are then given the opportunity to take the “Successful Investor Series”, a full (8) class course. This comprehensive education provides a solid grounding in the skills required for the successful implementation of the “OptionsWest Style Covered Call” approach.

A) Starter Class

Successful Investor Series “Starter Class” **Free** (3) Hour Class

1) Successful Investor Series (California Classroom)

This series of eight classes is the core course of study for learning to invest with the same strategy we use in the successful Equifund account.

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| 1) <u>Successful Investing 101</u>
Stock Trading Basics | (3) Hour Class | \$ 1,000.00 |
| 2) <u>Options Trading 101</u>
Investing and Options Basics | (3) Hour Class | \$ 1,000.00 |
| 3) <u>Covered Call Concepts</u>
Covered Calls and Options | (3) Hour Class | \$ 1,200.00 |
| 4) <u>Covered Call Trading</u>
Covered Calls from A to Z | (3) Hour Class | \$ 1,200.00 |
| 5) <u>Covered Call Workshop</u>
Covered Call Hands-On Lab | (3) Hour Class | \$ 1,200.00 |
| 6) <u>TradeView Investor</u>
TradeView Software Trading | (3) Hour Class | \$ 1,200.00 |
| 7) <u>Technical Analysis / Charts</u>
Flex Charts Technical Analysis | (3) Hour Class | \$ 1,500.00 |
| 8) <u>Successful Stock Investor</u>
Stock and LEAP Investing | (3) Hour Class | \$ 1,500.00 |

We offer a “**Pro Investor Package discount**” for enrolling in the full course.
(See Pro Investor Package Info sheet Attached)

2) Investor Super Sessions

The Investor SuperSessions are monthly (2) hours meetings, where details of the current month Equifund trades are explained and dissected. Trading ideas for future trades are also presented and discussed. These sessions are included in the monthly e-Advantage service and the packaged courses as well.

➤ Investor Super Sessions Monthly (2) Hours \$50 each \$ 600.00/year

3) Experienced Trader Short Course – Learn Equifund Trading

This course is for investors with a strong background in market investing and allows individuals who are familiar with options, covered calls and trading to quickly get up to speed on our approach. It includes 4 sessions plus a workshop.

1) Concepts & Fundamentals (3) Hour Class
Core Risk Management Concepts

2) OptionsWest Style Covered Calls (3) Hour Class
Risk management levels and Approach

3) TradeView & Workshop (4) Hour Class
Coved Call Workshop and TradeView

4) Technical Analysis & Trading (4) Hour Class
Charts and Coved Call Selection

5) Workshop (3) Hour Class
Workshop and Skills Practice

All five sessions are a Package Course \$ 4,800.00

4) Advanced Options Investor Course

The Advanced Investor Course includes (3) classes that concentrate on Momentum Stock and Options trading, including the magic of Volatility Squeezes.

1) Advanced Stock Trading (3) Hour Class
Momentum Stock Trading

2) Advanced Options Trading (3) Hour Class
Successful Options Trading

3) Stock & Options Workshop (3) Hour Class
Workshop and Skills Practice

All Three Classes are a Package Course \$ 6,500.00

50% discount for clients who have completed Basic Course \$ 3,250.00

5) Fly-In Weekend Investor Course

For those of you who live out of state, we offer comprehensive single and double weekend (Friday thru Sunday) intensive courses that teach the same core strategy and approach that is so successful in our Equifund.

- Experienced Investor Weekend Course \$ 4,800.00
equiFund Covered Call Strategy 50% Annual Return
- Comprehensive Double Weekend Investor Course \$ 7,700.00
equiFund Covered Call Strategy 50% Annual Return

6) Fly-In Weekend Advanced Course

For those of you who live out of state, we offer comprehensive single and double weekend (Fri thru Sun) intensive courses teaching Stock and Options trading.

- Experienced Trader Weekend Course \$ 6,500.00
Momentum Stock and Options trading
- Comprehensive Double Weekend Trader Course \$ 7,700.00
Momentum Stock and Options trading

Trading Tools

OptionsWest has two tools that allow clients to implement our core trading strategy with confidence and a minimal amount of research and time. These tools are indispensable to our own trading and make our investing fun and easy.

1) TradeView Software

This software is designed to greatly enhance an investor's ability to select, manage, track, and grow a trading account. TradeView is an integral part of our curriculum and is a key component to successful trading and risk management.

- TradeView Software \$ 700.00

2) E-Advantage Membership includes the Daily Covered Call List

This daily sheet lists the possible trades that are available each day and is the basic list we use in selecting new monthly positions for the equiFund.

- Daily Covered Call List \$ 100.00/month \$ 69.00/ month
(Part of the e-Advantage Service) w/ Credit Card acct

Optionswest e-Advantage Membership Service

We offer a monthly service that includes email alerts of our trades, lists of potential trades, strategic market information and more.

1) OptionsWest e-Advantage Membership

The OptionsWest e-Advantage monthly service allows you to follow along with all the trades and details of the OptionsWest equiFund. This allows you to observe all the steps as they occur in the approach that has been so successful in consistently achieving a better than 50% average annual return. Also included in the monthly service are these tools and reports.



Email Trade Alerts for *EquiFund*

These timely daily email alerts follow every step we make and report every management move for each trade in the equiFund. Alerts are sent within 5-10 minutes of a position move.



Daily Covered Call Listing Sheet

This daily sheet lists the possible trades that are available each day and is the basic list we use in selecting new monthly positions for the equiFund.



***EquiFund* Detailed Trade Log**

This detailed log chronicles every decision and step taken in every management move for each trade in the equiFund. This log is up-dated within 20 minutes of each move including the initial purchase.



OptionsWest Oscillator Graphic

This graph shows the over-bought or over-sold condition of the market in general. It is a very helpful gage on what level of risk to take in placing trades within the scope of an account.



Weekly Volatility Squeeze Report

This weekly report lists all the Volatility Squeezes that we are watching. V-Squeeze trades are a consistently successful market trading strategy and we use this list to place active trades.



V-Squeezes that are Working

This report shows Volatility Squeezes that are working well and that we are trading in our own accounts. We also provide details of our entry and exit decisions with these squeeze positions



Weekly Market Report

This weekly report is an overall view of the market demographics and sentiment. It also shares our thoughts on where we think the market is headed in the short term and why.



Chart of the Week

We choose a single chart each week that represents a stock that is working well. This is a stock that is obviously under accumulation by the institutions and is an investment opportunity.



Sectors the are Working

Institutional money moves from sector to sector as market forces dictate. Following the money is a good way to have consistently profitable trades. This weekly report list the sectors that are working.



Charts that are Working

This weekly report lists stocks that have charts that are technically in a sweet spot. Technical traders love a good looking chart, as they know it will make them money. We trade from these reports.



The Sweet List

This list is published weekly and shares the stocks we are looking to trade.



OptionsWest / Daily Rocket

These email alerts share trading ideas we find as the opportunity arises.

2) One-On-One Consulting

For clients who have completed our eight core classes or a weekend investment course, we offer one-on-one consulting to help with individual account issues and training.

➤ One-On-One Phone Consulting (Session is ½ hour)

\$ 120.00
/session

Pro Investor Package

\$ 8,300.00

For clients who are taking the full **Successful Investor Series** in the California Classroom course we have a full package discount price arrangement that saves \$4,000.00 and offers unlimited repeats on the classes for up to two years.

Valued at
\$12,300.00

Save
4,000.00

Discount Price
\$8,300.00

Pro Investor Package Includes:

- 1) Successful Investing 101 \$1,000.00 (3) Hour Class
- 2) Options Trading 101 \$1,000.00 (3) Hour Class
- 3) Covered Call Concepts \$1,200.00 (3) Hour Class
- 4) Covered Call Trading \$1,200.00 (3) Hour Class
- 5) Covered Call Workshop \$1,200.00 (3) Hour Class
- 6) TradeView Investor \$1,200.00 (3) Hour Class
- 7) Technical Analysis / Charts \$1,500.00 (3.5) Hour Class
- 8) Successful Stock Investor \$1,500.00 (3) Hour Class

➤ (12) Investor SuperSessions \$ 600.00 (2)Hours each
(\$ 50.00 each session)

➤ TradeView Software License \$ 700

➤ Includes TradeView Software Updates FREE for a year

➤ Includes (12) months of the Optionswest *e-Advantage Service...* \$1,200

➤ Free Refills for 2 years! – Take the classes as many times as you require!

Total Value \$12,300.00

Only \$8,300.00