

# OptionsWest.com

## Courses, Classes, Trading Tools and Services

The first step for successful investor clients is to take the Free Starter Class; either on-line through the website or “live” in our southern California classroom. This Starter Class shares the concepts and skills we use to trade the successful EquiFund example account. Local clients have the opportunity to take the “Successful Investor Series”, a full (8) classroom course. This same course is also taught in our Fly-In Weekend seminars. The comprehensive education provided through these avenues offers a solid grounding in the skills required for the successful implementation of the “OptionsWest Style Covered Call” approach, as well as, a solid foundation in running a successful stock trading account.

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### A) Starter Class

Successful Investor Series “Starter Class”

Free (3) Hour Class

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## OptionsWest Successful Investor Series

Our flagship course is the eight class education we call the Successful Investor Series. It is taught in our southern California classroom (Rancho Santa Margarita) and is a self-paced learning experience. You take the classes in order, but may plan them around your schedule. Once mastered the skill set that you will learn in these courses is simple, straightforward, and a set of powerful tools that will enable you to smoothly and confidently navigate the challenges of investing in the market. The road to reaching this goal is rigorous and requires a focus and discipline that will be well worth the effort.

### Successful Investor Series

### ( California Classroom )

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|---------------------------------------|---------------------------------|----------------|
| 1) <u>Successful Investing 101</u>    | Stock Trading Basics            | (3) Hour Class |
| 2) <u>Options Trading 101</u>         | Investing and Options Basics    | (3) Hour Class |
| 3) <u>Covered Call Concepts</u>       | Covered Calls and Options       | (3) Hour Class |
| 4) <u>Covered Call Trading</u>        | Covered Calls from A to Z       | (3) Hour Class |
| 5) <u>Covered Call Workshop</u>       | Covered Call Hands-On Lab       | (3) Hour Class |
| 6) <u>TradeView Investor</u>          | TradeView Software Trading      | (3) Hour Class |
| 7) <u>Technical Analysis / Charts</u> | Charts / Technical Analysis     | (3) Hour Class |
| 8) <u>Successful Stock Investor</u>   | Running a stock Trading Account | (3) Hour Class |

Our “Pro Investor Package” ( See details on attached sheet ) offers the complete investor education package including the Successful Investor Series and is currently discounted at: **\$8,300.00**

## Fly-In Weekend Investor Course (Refresher Weekend Included)

For those of you who live out of state, we offer a comprehensive double weekend (Thursday thru Saturday) intensive course that teaches the same core strategy and approach that is so successful in our Equifund. The second refresher weekend is always part of the plan and will be imperative for those who are initially learning equity investing from the ground up.

- Comprehensive Double Weekend Investor Course **\$ 8,300.00**  
EquiFund Covered Call Strategy has a 50%  
Annual Return Objective

## Investor Super Sessions

These monthly meeting are for those who have completed the Successful Investor Series or a Fly-In Weekend Course.

The Investor SuperSessions are monthly (1) hour meetings, where details of the current month Equifund trades are explained and dissected. Trading ideas for future trades are also presented and discussed.

- Investor Super Sessions Monthly (1) Hour

## Experienced Investor 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 - Core Risk Management Concepts (3) Hour Class
- 2) OptionsWest Style Covered Calls - Risk levels approach (3) Hour Class
- 3) TradeView & Workshop - Coved Call Workshop and TradeView (3) Hour Class
- 4) Technical Analysis & Trading - Charts and Coved Call Selection (3) Hour Class
- 5) Workshop - Workshop and Skills Practice (3) Hour Class

All five sessions are a Package Course **\$ 5,400.00**

## Advanced Investor Course

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

- 1) [Advanced Stock Trading](#) - Momentum Stock Trading (3) Hour Class
- 2) [Advanced Options Trading](#) - Successful LEAP Options Trading (3) Hour Class
- 3) [Stock & Options Workshop](#) - Workshop and Skills Practice (3) Hour Class

All Three Classes are a Package Course \$ 6,900.00

50% discount for clients who have completed a prior OptionsWest Course \$ 3,450.00

## Fly-In Weekend Advanced Course

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

- [Experienced Trader Weekend Course](#) \$ 6,900.00  
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.

## 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

## OptionsWest Trading Service (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](#) \$ 69.00/ month  
( Part of the Trading Service monthly subscription )

## *OptionsWest Trading Service Details*

We offer a monthly service that includes email alerts of our trades, lists of potential trades, strategic market information on what sectors and charts are working and which are not and more. The monthly service presents the details of our Volatility Squeeze and Momentum trades and sends out timely email alerts of all trades placed in these accounts. We also offer one-on-one consulting for clients who have taken at least one of our courses.

### OptionsWest Trading Service Monthly Subscription

The OptionsWest 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. Each day we send out a summary as well called the “Daily Rocket” with an update on all three example trading accounts.



#### **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.

➤ [e-Advantage Monthly Service](#)    \$ 100.00/month    \$ 69.00/month  
w/ Credit Card acct

## 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 hour )    \$ 240.00 /session

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## Pro Investor Package

**\$ 8,300.00**

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For clients who are taking 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 (4) Hour Class
- 8) Successful Stock Investor \$1,500.00 (4) 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 Trading Service...* \$1,200

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

Total Value \$12,300.00

**Discounted Price** **\$ 8,300.00**