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Course Information

Course Title: Investing Guidebook #361924

Number of continuing education credit hours recommended for this course:
In accordance with the standards of the CFP Board, the IDFA, and the National Registry of CPE Sponsors CPE credits have been granted based on a 50-minute hour.

CFP®: 5.5 (Registered with the CFP Board: Program ID 320302)

CDFA®: 7 (Registered with the Institute for Divorce Financial Analysts)

CPA: 7 (Accepted in all states)

National Registry of CPE Sponsors ID Number: 107615.
Sponsor numbers for states requiring sponsor registration:
Florida Division of Certified Public Accountancy: 0004761 (Ethics #0011467)
Hawaii Board of Accountancy: 14003
New York State Board of Accountancy (for ethics): 002146
Ohio State Board of Accountancy: CPE.51 PSR
Pennsylvania Board of Accountancy: PX 178025
Texas State Board of Accountancy: 009349

Course Description

It can be difficult to earn a consistent return on your invested funds. In the *Investing Guidebook*, we cover how to set up a structured approach to investing that improves your ability to gain a good return on your investments. It addresses the basic investment types, the sequence of investing activities, individual retirement accounts, and how to invest in stocks, bonds, and funds. It also reveals a number of ways to extract useful information from company financial statements, and how to measure your investing performance. The tips included in this course can be of great assistance in improving your investing skill.

Course Content

Publication/Revision date: 4/24/2024.
Author: Steven M. Bragg, CPA.
Final exam (online): Thirty five questions (multiple-choice).

Program Delivery Method: Self-Study (interactive)

Subject Codes/Field of Study

NASBA (CPA): Specialized Knowledge; CFP Board, IDFA: Investment Planning

Course Level, Prerequisites, and Advance Preparation Requirements

Program level: Overview
Prerequisites: None
Advance Preparation: None

Instructions for Taking This Course

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- **You must complete this course within one year** of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From "My Account," Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- **Complete the course by** following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Online Exam

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a printed copy of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

- Identify the different types of investments.
- Specify how to calculate the return on investment.
- Describe the investing goals associated with a high marginal tax rate.
- Identify the investing goals associated with someone approaching retirement age.
- Specify the investing actions to take when the market appears to be overheated.
- Identify the characteristics of an individual retirement account.
- Recall the characteristics of the most common stock indices.
- Specify the strategies most commonly followed by hedge funds.
- Describe the best practices for investing in stocks and funds.
- Identify the investment criteria for a money market fund.
- Specify the differences between a market order and a limit order.
- Recall how the accounting equation is used.
- Specify the scenarios in which a business may report a cash balance of zero.
- Identify the businesses in which inventory is more or less likely to be a consideration.
- Recall the competitive strategies that require a reduced inventory investment.
- Recall the circumstances under which financial leverage is more beneficial.
- Specify the threshold at which debt levels are considered to be minor.
- Recall how to calculate book value.
- Specify the type of investor that is attracted to rapid sales growth.
- Identify the situation in which a business experiences highly-reliable sales.
- Recall the methods used to improve gross margin.
- Specify which expenses are classified as operating expenses.
- Identify the business model that tends to experience high operating expenses.
- Recall how the net profit margin can be improved.
- Specify what may happen when a company’s price/earnings ratio is high.
- Identify the contents of the total shareholder return calculation.

About the Author

Steven Bragg, CPA, has been the chief financial officer or controller of four companies, as well as a consulting manager at Ernst & Young. He received a master's degree in finance from Bentley College, an MBA from Babson College, and a Bachelor's degree in Economics from the University of Maine. He has been a two-time president of the Colorado Mountain Club, and is an avid alpine skier, mountain biker, and certified master diver. Mr. Bragg resides in Centennial, Colorado. He has written more than 250 books and courses, including *New Controller Guidebook*, *GAAP Guidebook*, and *Payroll Management*.

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