

The Beginner Investor



✓ Pre-Class Setup Checklist

(10–15 minutes total)

1 Check Your Email

- ✓ Locate your class confirmation email
- ✓ Save it or star it for easy access
- ✓ Make sure you have:
 - Live class date & time
 - Access link
 - Community login info

➔ If you don't see it, check Spam or Promotions.



2 Set Up Your Learning Space

- ✓ Choose a quiet space where you can focus
- ✓ Have a notebook or notes app ready
- ✓ Bring a pen, tablet, or laptop
- ✓ Grab water or a snack so you're not distracted



3 Brokerage Account (Optional, Not Required)

You do not need a brokerage account to attend, but if you already have one:

- ✓ Log in and make sure you know your username/password
- ✓ No buying or trading required before class

➔ If you don't have one yet. ➔ Don't worry –we'll talk through this step together



4 Review the Beginner Investing Glossary

- ✓ Skim the glossary so terms sound familiar
- ✓ Focus on:
 - Stocks
 - Index funds
 - ETFs
 - Dividends

➔ This is just *exposure*, not memorization.



You're Ready

That's it. You're officially prepared for class.

You don't need to know everything — you just need to *show up*.