

Buying And Selling Securities:

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Buying:

- 1. I am looking all the time. Examples:**
 - a) I watch a demography program and learn that India's demography is fabulous for their economy - average age around 30 - very productive. I think about Indian ETF's.**
 - b) I watch Jim Cramer and learn about a fast growing game company, Hasbro.**
 - c) I am in a fitness class and notice many FITBIT users.**
- 2. I try to be fully invested all the time. All of my money working. Dividends are reinvested.**
- 3. When investment money is available, I invest it.**
- 4. When I have investment money, I compare the things I have been looking at. For comparison purposes, I use many of these tools:**
 - a) Junk Bonds on FINRA.**
 - b) Yahoo Finance.**
 - c) Morningstar.**
 - d) Charles Schwab.**
 - e) Better Investing's ToolKit.**
 - f) AAll Model Portfolio Spreadsheets.**
 - g) Ron Black's Spreadsheet.**
 - h) StockCharts.com - Free Charts - Perf Charts.**
- 5. When I reach a decision, I use my spreadsheet to see how many I can buy.**
- 6. I then go on-line and place my order. I usually use a limit price based on Yahoo Finance.**
- 7. I normally stipulate good-til-cancelled, giving time for the order to execute.**
- 8. After order execution, I enter the purchase into my investment log, where I write transaction details and the reasons for my purchase.**

Over time the investment log becomes a helpful reference.

Selling:

- 1. I don't sell unless I find something better or I need the money. Here are the steps:**
 - a) I review my accounts. If I am selling dogs, I want to sell all of them. If I am raising money, I want to get enough.**
 - b) I use the resources listed in 4 above in my review, deciding what to buy as well as what to sell.**
 - c) I then go on-line and place my order. I usually use a limit price based on Yahoo Finance.**
 - d) I normally stipulate good-til-cancelled, giving time for the order to execute. Sometimes I use market orders.**
 - e) After order execution, I enter the purchase into my investment log, where I write transaction details and the reasons for my sale.**