HOWLING WOLF

Course Catalog

A complete list of all catalogs, courses and class segments.

Series/Courses/Topics
Money Culture Core Curriculum
- **Steps to Financial Literacy**
What is Money Culture- The Need for Financial Literacy Movement
The Need for Investor Education
The Boomer Savings Crisis
You May be Pretty but you are not a 6
How to Pick the Right Advisor
Designations and Sales
Financial Resources
-Stocks
Types of Stocks
Categories of Stocks
Buying and Selling Stocks
Final Quiz
-**Bonds**
Bond Basics
Types of Bonds
Buying Bonds
Final Quiz
-Vehicles for Investing
Mutual Funds and ETFs
Savings
Alternatives
Annuities
Final Quiz
-Investment Strategies for Life
Investment Strategies

Bill of Rights
Additions

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Courses/Topics
-Die Early Prepare Your Life for Retirement
The Problem: The Retirement Crisis
Analyzing the Problem
Social Security
Whose There to Help
Helpers
Advice to Financial Advisors
Conclusion
Additional Resources
Full Txt and Slide Show
Final Quiz

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Series/Courses/Topics
How to Not Get Ripped Off: Somebody Else's Money
-Securities Fraud
Historical Fraud
Bernie Didn't Invent It
Wall Street Tango
More Financial Services
Final Quiz
-Fiduciary Forensics
Fiduciary Basics
Fiduciary Principals and Process
Conflicts of Interest
The Clients Aren't Listening
Final Quiz
- The Biggest Crooks in Corporate Fraud
Lunch at Dead Possum Country Club
Cronyism and The Fat Cat board
Billion Dollar Train Wrecks
Final Quiz
-Securities Fraud in the Digital Age
World Wide Web
Scams, Shams and Flimflams
You Are Known by the Company you Keep
Final Quiz
- Financial Reform
2006 PPA
Financial Reform 2010
What Financial Reform Really Means
Investment Objective Questionnaire
Final Quiz

Series /Courses/Topics
Financial Professional
Contemporary Investment Management Due Diligence
Module 1-The Evolution of Due Diligence
Module 2-Schools of Thought
Module 3 – Part 1, Perf. Eval. And Bench.
Module 4 - Benchmarks
Module 5 Attribution Analysis
Module 6 – Custom Benchmarking and Hyposis testing
Module 7 – Not Much Has Changed
Final Quiz
New White Paper -Correcting Core

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Series/Courses/Topics
Money Culture for Business Entrepreneurs
-Investment Strategies for Business
Investment Strategies
Asset Allocation
Strategic Investments
Other Strategies
Managed Accounts
Final Quiz
Final Quiz
-Understanding Economics
Basics of Market Economics
Capitalism
Globalism
Final Quiz
-**What is Fed Reserve and what do they do?**
Banking
Federal Reserve
Money Supply
How the Fed Works
Interest Rates
Why the Fed Works
Final Quiz
-How and Why Markets Move
What Makes Markets Move
Big Oil – Blame Wall St.
Final Quiz

Series /Courses/Topics
Money Culture For Educators Certificate Series
- **Steps to Financial Literacy**
What is Money Culture- The Need for Financial Literacy Movement
The Need for Investor Education
The Boomer Savings Crisis
You May be Pretty but you are not a 6
How to Pick the Right Advisor
Designations and Sales
Financial Resources
What Can MoneyCulture Do for You
-Stocks
Types of Stocks
Categories of Stocks
Buying and Selling Stocks
Final Quiz
-**Bonds**
Bond Basics
Types of Bonds
Buying Bonds
Final Quiz
-Vehicles for Investing
Mutual Funds and ETFs
Savings
Alternatives
Annuities
Final Quiz
-Investment Strategies for Life
Investment Strategies

Asset Allocation
Strategic Investments
Other Strategies
Managed Accounts
Final Quiz
-Setting Investment Objectives to Reach your Goals
Introduction to the Investment Process
Determining Investment Objectives
Setting Objectives
Risk
Return vs. Risk
Implementation Manager Selection
Ongoing Evaluating
Final Quiz
-Understanding Economics
Basics of Market Economics
Capitalism
Globalism
Final Quiz
-**What is Fed Reserve and what do they do?**
Banking
Federal Reserve
Money Supply
How the Fed Works
Interest Rates
Why the Fed Works
Final Quiz
-How and Why Markets Move
What Makes Markets Move
Big Oil – Blame Wall St.
Final Quiz
-Know your Rights

Bill of Rights
Additions
- Investor DNA Questionnaire
-25 Federal Reserve Lesson Plans

HOWLING WOLF

Series/Courses/Topics
Global Fiduciary Strategist
Module 1 – Getting Started
Session 1 - Requirements for Certificate of Fiduciary Studies and GFS designation.
Session 2 - Introduction to the Thunderbird School of Global Management and 3ethos
Session 3 - Course overview; prerequisites. Duration
Session 4 - Course materials; Resource Center.
Resource Center.
Module 2 – Defining a Fiduciary Ethos
Session 1 - Introduction to the concept of "ethos".
Session 2 - Linking ethos to fiduciary responsibility; keys to effective decision-making
Session 3 - Introduction to the Ethos decision-making framework; leadership behaviors; indigenous wisdom
Session 4 - Introduction to the Ethos Steps and Dimensions
Session 5 - Ethos soft skills; traits of an Ethos advisor; benefits of a defined Ethos
Resource Center
Module 3 – A Survey of Fiduciary Standards
Session 1 - Fiduciary defined; common vs. statutory law; prudent person vs. prudent expert; procedural prudence
Session 2 - The 4 fiduciary pillars – Principles, Process, Prudence and Persistence; SEC focus on linking ethics to decision-making
Session 3 - Overview of ERISA, UPIA, UPMIFA, and UMPERSA
Session 4 - Uniform standards; legal substantiation; safe harbor procedures
Session 5 - Confluence of events; Dodd-Frank
Session 6 - DOL pending regulations; Everything You Need to Know
Resource Center
- **Module 4 – Step 1 - Analyze**
Session 1 – Introduction to Step 1
Session 2 – Dimension 1.1
Session 3 – Dimension 1.2
Session 4 – Dimension 1.3

Resource Center
- Module 5 – Step 2 – Strategize
Session 1 –Overview of Step 2; Dimension 2.1
Session 2 – Dimension 2.2
Session 2 – Dimension 2.3
Session 2 – Dimension 2.4
Resource Center
Module 6 – Step 3 – Formalize
Session 1 –Overview of Step 3; Dimension 3.1
Session 2 – Dimension 3.2
Session 2 – Dimension 3.3
Resource Center
Module 7 – Step 4 - Implement
Session 1 –Overview of Step 4
Session 2 – Dimension 4.1
Session 2 – Dimension 4.2
Session 2 – Dimension 4.3
Resource Center
Module 8 – Step 5 - Monitor
Session 1 –Overview of Step 5
Session 2 – Dimension 5.1
Session 2 – Dimension 5.2
Session 2 – Dimension 5.3
Session 5 – Confluence of events; Dodd-Frank
Resource Center
Module 9 – Assessment Procedures
Session 1 – Purpose of assessment procedures Session 2 – Information on the leadership assessment instrument, and the self- assessment checklists
Resource Center
Module 10 – Building Client Trust
Session 1 – Alignment of the ethos process; rules versus principles
Session 2 – Congruent steps associated with a defined ethos

Session 3 – Building client trust; 4 cores of credibility; 13 behaviors for building trust
Session 4 – Maintaining client loyalty; loyalty by design
Resource Center
Module 11 – Exam Preparation

Series/Courses
Certified Wealthcare Analyst
Lesson 1 – The Swing Designed by Committee – Industry "Best Practices" Compared to Wealthcare
Lesson 2 – Orchestrating the Music of Peoples' Lives
Lesson 3 – Discovery… Getting to the Heart of What Someone Values- Making Money Meaningful
Lesson 4 – Designing Advice That Inspires – Where it All Comes Together
Lesson 5 – Reliability – Implementing a Portfolio that Makes Dreams a Reality
Lesson 6 – Changing Your Plan to Stay on Track – Ongoing Advice and Monitoring
FINAL EXAM

