The Advanced Investment Research Class teaches students a deep due diligence research process that combines elements of both investigative journalism and forensic financial analysis. It provides students with a comprehensive research framework that follows a series of defined tasks that direct students to explore and analyze information, foster creativity and originality, and to recognize and highlight common cognitive biases that inhibit the researcher’s ability to objectively assess information. The class also considers strategies for making analytical judgments to better evaluate evidence. In addition, the class works to strengthen students’ financial writing and oral presentations by teaching students how to develop and follow a compelling logical progression.

Learning outcomes:
1. A deep due diligence research process
2. Awareness of common cognitive biases and their impact
3. Appreciation for varying perspectives/ awareness of the incentives of other information providers
4. Ability to craft cogent thesis statements
5. Ability to craft a logical and compelling financial narrative for oral and written presentation

Class Structure:
1. Discussion of HW
2. Presentations/Group Work
3. Speakers

Expectations:
- No computers.
- HW Due Mon midnight each week
- Thoughtful, engaged participation in our class work, our homework and with our speakers that contributes to a positive learning environment and class culture.
**HW before class begins:** Pre Class Assigned Reading

Read the assigned books and handout listed below and write a one page summary or bullet point list for each to answer the below questions:

1. What were the main points/takeaways for you?
2. How can you apply the lessons learned?

Books:
   a. Behavioral Psychology: Influence, Robert Cialdini
   b. Learning: Art of Learning, Josh Waitzkin
   c. Research Process: Handout from Professor: Introduction to The AREA Method

Due before class begins. **The time stamp is meaningful.**

**THIS SYLLABUS IS A WORK IN PROGRESS. AT TIMES CLASS FORMAT, CONTENT AND/OR LOCATION MAY CHANGE TO MAKE ROOM FOR GUEST SPEAKERS, FIELD TRIPS OR OTHER AMENDMENTS.**