



# GREICO ACADEMY FOR WALL STREET



WALL STREET ACADEMY

# **ARE YOU READY TO TRANSFORM YOUR BUSINESS? •**

Double, Triple, Even Quadruple your  
business



- Breathe New Life into your business
- Start Having Fun in your business
- Do better and more satisfying business for you and your clients

**“Helping families make rational decisions in irrational times.”**

- Be a Rainmaker *because you where there.....*

## WALL STREET ACADEMY

### **ARE YOU READY TO TRANSFORM YOUR KNOWLEDGE OF THE FINANCIAL SERVICES INDUSTRY AND “BECOME MASTER OF THE CRAFT”?**

- Become the industry expert
- Explain to clients what information causes the markets to move the way they do
- Give clients information they won't get anywhere else

Be the one who can tell the  
complete

story of the latest IPO and the process  
used to bring these to the market

3"

Coriht © James Greico

## WALL STREET ACADEMY

### **ARE YOU READY TO TRANSFORM YOUR KNOWLEDGE OF THE FINANCIAL SERVICES INDUSTRY AND “BECOME MASTER OF THE CRAFT”? (cont’d)**

- Become the center of the clients financial universe
- Controlling more of the clients assets and every aspect of their financial well-being
- The go-to person in their financial life, *They don't open a checking account without seeking your approval*

- Be more confident in your knowledge so you can re-assure them about their financial well-being

***You will see less clients and double or triple your income*** 4"

Coriht © James Greico

WALL STREET ACADEMY

**ARE YOU READY TO TAKE YOUR CAREER TO THE NEXT LEVEL?**

- Achieve the unachievable?
- Present the un-presentable?
- Approach the unapproachable?



- Make the money you never thought possible?

***IF SO THEN....***

5"

Copyright © James Greico

WALL STREET ACADEMY

**YOU ARE READY FOR A WEEK OF WALL STREET  
ACADEMY TO LEARN HOW TO CONDUCT YOUR BUSINESS  
IN THE NEW WALL STREET**



6"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

**THE NEW WALL STREET IS DEFINED BY:**

- Professionalism
- Knowledge and expertise
- Trust and Integrity
- Confidence and Class





## WHAT IS THE NEW WALL STREET...

- A new way of doing business with your clients that puts you in the center of the clients financial universe
- A style
- A unique signature
- A thought process
- A methodology



# WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

## **CREATING THE IDEAL CLIENT RELATIONSHIP AND THE IDEAL CLIENT EXPERIENCE**

Wall Street Academy teaches you  
how  
to do business in the new Wall Street.

You will learn how to create the ideal  
client relationship and deliver the  
client experience ideal.



## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

PUSH **Vs** PULL **PULL**

*In the Days of*

*the Old (Pre-WSA) New Wall Street (WSA)*

from their industry expert

1. Advisors push clients to  
recognize needs and objectives

2. Clients seek products and  
services

2. Advisors push products and  
services

3. Clients motivated to act 10"

3. Advisors push clients to act

1. Clients pull in information

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **CREATING THE IDEAL CLIENT RELATIONSHIP AND THE IDEAL CLIENT EXPERIENCE**

#### “The Doctor Patient Relationship”

- A relationship based on professionalism
- Trust
- Experience
- Expertise

**“A patient never questions a doctors advice”**

# WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

## **“THE DOCTOR PATIENT” RELATIONSHIP (cont’d)**

How do we package/recreate the doctor-patient relationship?

This is what Wall Street Academy is all about....



12"

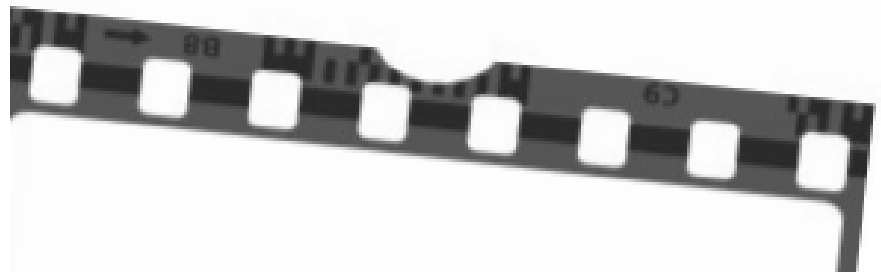
Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **YOUR OFFICE IS A HOLLYWOOD MOVIE SET**

The Elements of a Hollywood  
Production (Movie Set)

- The right room/setting



- The right reps
- The right extras/casting
- The right lights
- The right materials
- The right wardrobe engineering



13"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

**YOUR OFFICE IS A HOLLYWOOD MOVIE SET (cont'd)**

Everything in your office should broadcast or convey

- Professionalism
- Trust
- Experience
- Expertise

**Attention to Detail : Master of the Craft** 14"

Coriht © James Greico

WALL STREET ACADEMY CURRICULUM  
HIGHLIGHTS

**WALL STREET ACADEMY CURRICULUM**



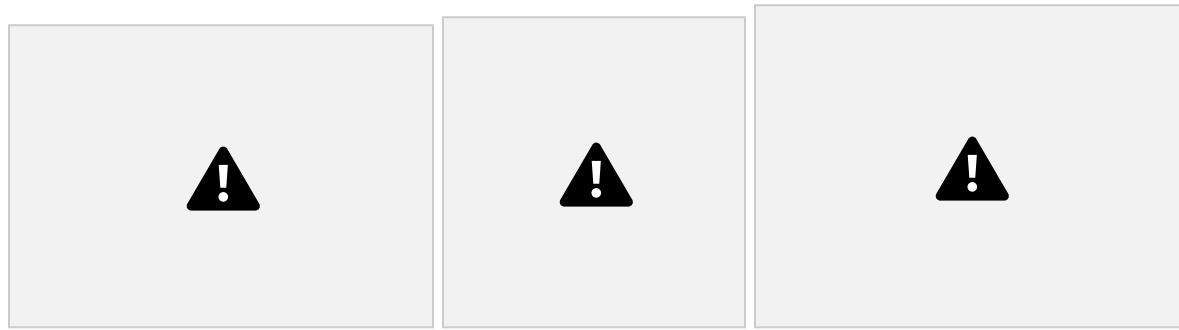
1. Introduction to Wall Street 2.
- Information Calisthenics 3. The
- tools for creating the ideal client experience
4. Economics
5. The Primary Markets
6. The History of Wall Street & The Financial Markets
7. Fundamental Analysis
8. The Walking Tour of Wall Street
9. Deutsche Bank
10. The World of Bonds Part I & II
11. Technical Analysis
- (Charting the efficient market theory) 12.

- The Role of the Federal Reserve in our economy (QE with a twist)
13. Federal Reserve & Gold Vault Tour 14.
- New York Stock Exchange – Trading FL 15.
- Social Training (the code of the rich) 16.
- Brooks Brothers (Wardrobe Engineering) 17.
- Dining Lab at Harry's (Live at a client dinner)
17. Creating the Ideal Client Experience 18.
- The Final Cut of the Entire Week 15"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

# INFORMATION CALISTHENICS



Information calisthenics is a daily exercise that shows you how to access the important economic and financial news that moves the markets.

Wall Street Academy believes knowledge of financial news and current events is one of the most important ways to engage a client in a meaningful discussion of their financial goals and objectives.

16"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

## **CREATING THE IDEAL CLIENT RELATIONSHIP AND THE IDEAL CLIENT EXPERIENCE**

Wall Street Academy gives you the tools, the knowledge, the expertise to create the ideal client relationship and the ideal client experience



17"

Coriht © James Greico

**WALL STREET ACADEMY CURRICULUM HIGHLIGHTS**

# ECONOMICS

This module will give you an in-depth understanding of the most important market moving economic data points.

This will be the core of any client presentation and is a vital part of delivering the 5-15 minute state of the economy as part of the ideal client experience.

# WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

## PRIMARY MARKETS

In this module you will explore the primary market, which is the process of raising money for companies and eventually taking them public.

You will learn the language of the deal and the important details of this process.

The easiest way to engage a client about their finances is to talk about the latest IPO's. We will examine the Facebook story and the IPO process.



Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **HISTORY OF WALL STREET AND THE FINANCIAL**



### **MARKETS**

This module covers the history of the financial markets and the first exchanges dating back to twelfth-century France, to 1640 and the beginning of Wall Street and continues to 1792 the year the Button

Wood Agreement was signed establishing the NYSE, right up until present day.

20"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **HISTORY OF WALL STREET AND THE FINANCIAL MARKETS**

Knowing the history of the financial markets demonstrates to clients:

- An immediate impression of superior knowledge, experience, and professionalism...*Master the Craft*
- Extensive knowledge of the financial services industry

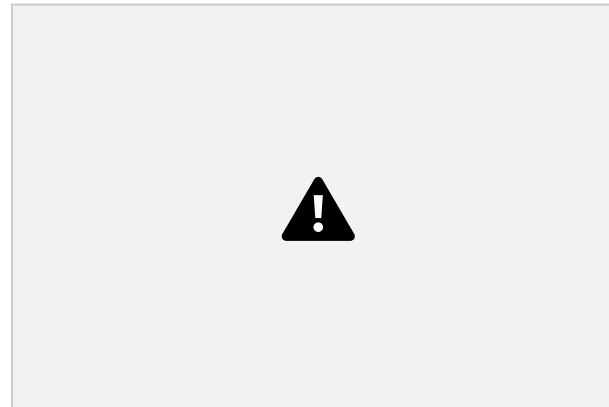
***“If you don’t know the history of your business, it’s not your business”***

*- David Parsons*

21"

Coriht © James Greico

WALL STREET  
ACADEMY  
CURRICULUM  
HIGHLIGHTS



## **FUNDAMENTAL ANALYSIS**

In this very informative module you will:

- Learn the basics of fundamental analysis
- Be able to understand what the analyst on CNBC and other financial news



- networks are talking about when discussing various companies. • Realize that the fundamental analyst believes that the price of a company stock very rarely reflects its true value which is also known as its *intrinsic value*.
- Learn that the purpose of fundamental analysis is to find investing opportunities for stocks that are trading below their intrinsic value. This is called *value investing*, an approach that is heavily championed by famous investor Warren Buffet.

Coriht © James Greico

22"

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **VISIT TO DEUTSCHE BANK INSTITUTIONAL SALES AND TRADING FLOOR (Headquarters 60 Wall St.)**

This lab module will introduce you to the



institutional Sales and trading people that supply the vital market moving information to the portfolio managers like T. Rowe Price, Rockdale, AQR, Fidelity and others.

These portfolio managers manage your clients money when your clients invest in mutual funds, annuities, and put their money with private managers like Rockdale, Blackrock, and AQR.



## THE WORLD OF BOND PART I AND II

In this very informative module you will learn that Bonds are the most important securities in the market.

It is the Bond market where interest rates are set and directly affect every sector of the economy and your daily lives.



***“The stock market, political outcomes,  
and each of you are held hostage by Bonds”  
-James Greico***

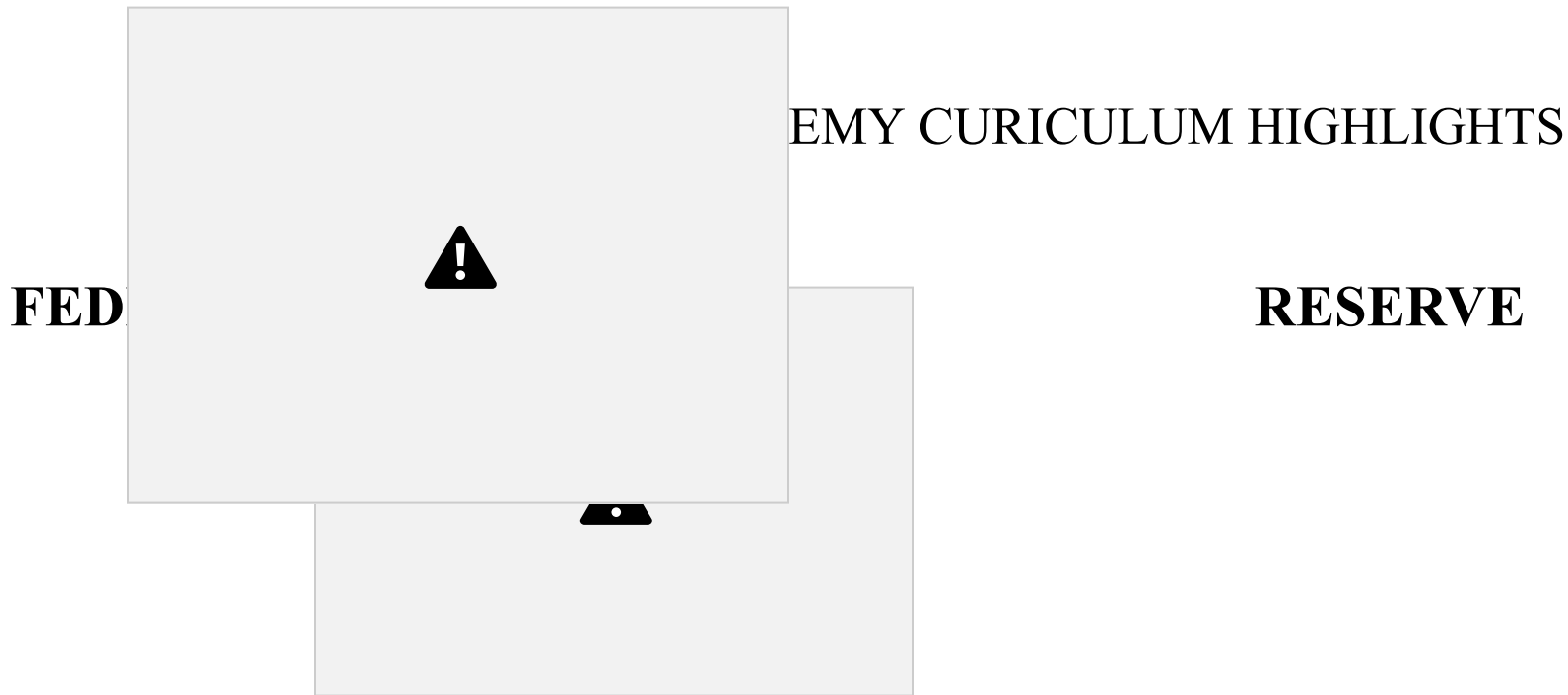
# TECHNICAL ANALYSIS



In this very informative module you will learn:

- the anatomy of a chart (support, resistance, volume)
- how to interpret trend line movements (break resistance/support, reversals)
- what chart formations tell you about trends (wedges, double tops, head and shoulders)
  - how to use other data to refine trend analysis (relative strength index, volume, open interest, simple moving averages, high/lows)

25"



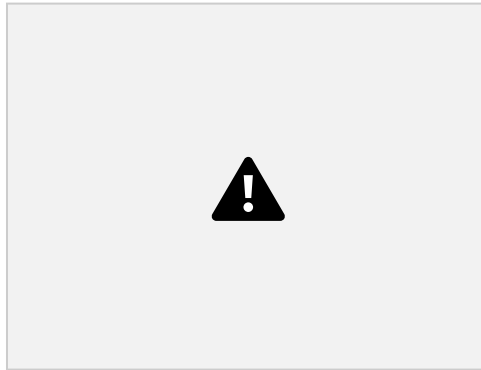
The actions of the Federal Reserve dominate global news headlines. In this module, you will learn first hand, how the Federal Reserve controls money supply and interest rates in our economy.

Our Wall Street Academy candidates receive a private lecture at the Federal Reserve, have the opportunity to visit the Gold Vault (where gold is kept) and learn first hand about the incredible impact the actions of the Federal Reserve have on the global economy (open market operations, interest rate changes etc.) 26"

# WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

## OLD AND NEW NYSE

Greico Financial Training Institute has established a partnership with the New York



Stock Exchange. Our Wall Street Academy participants have the opportunity to be live at the NYSE, in the center of the Financial District, and spend time with designated market makers and learn from the members of the NYSE floor.

This is preceded by a private lecture upstairs at the NYSE where candidates will learn the rich history from 1792 to present day.

*Absolutely nothing conveys expertise and knowledge of the financial markets like*

*having first hand experience at the floor of the NYSE! 27"*

Coriht © James Greico

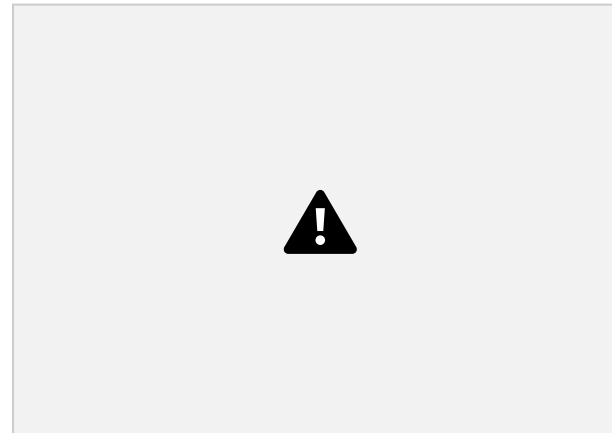
## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **SOCIAL TRAINING ETIQUETTE**

In this module you will learn the uniform language of the super rich, establish wealth, and class.

*“The Code of The Rich”*

*“Money goes to Money”*



It is important that you know:

- The proper introductions for business and social gatherings

- The proper behavior when visiting with clients (handshakes, doors, elevators, etc.)

28"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

### **SOCIAL TRAINING ETIQUETTE (cont'd)**

- The proper etiquette when dining with clients (eating, spoons, etc.) •
- The proper conversation
- The proper phone/email etiquette
- The who's who in a restaurant (Your hosting, toasting, tipping survival guide)



*“Remember all of this shows a client you will manage their money not steal it”*

Live%inning%lab%at%%  
HARRY’S%on%%  
Thursday%night!%

29"

Coriht © James Greico

## WALL STREET ACADEMY CURRICULUM HIGHLIGHTS

**BROOKS BROTHERS – WARDROBE ENGINEERING** *“You never  
get a second chance to  
impression”*

- **Ronald  
Brooks**



**Ferguson** *Wardrobe Engineer  
Brothers*

**Are you Broadcasting the right message?**

You must package yourself to convey attention to detail, trust, expertise and experience.

*Your packaging will reflect the level of trust, expertise and experience.*

30"