



Dear trader/investor,

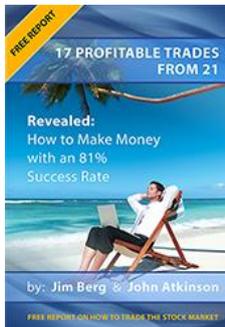
Today we would like to provide an update regarding the **Launch of Jim's Signals** as well as the release of a New Trading Platform and **Advisor-Assisted Facility**.

In brief, our Trading Partner Avestra Capital can offer you:

- ✓ Do it Yourself (DIY) or Advisor Assisted Facility
- ✓ Trade Australian & International markets
- ✓ Access to an international award winning Trading Platform
- ✓ Comprehensive reporting ability - FREE

## 1) Signals Launch Update

We recently released a new Report on Jim's exemplary track record between September 2012 and May 2013, called '*17 Profitable Trades from 21*'.



If you have not yet read it, we invite you to [Click Here](#).

In April 2013, just before we were due to launch our new Trading and SMSF Investing Signals Services, Jim issued a '*Caution*' in our Newsletter, so we decided to postpone that launch and Jim progressively closed the Newsletter Portfolio in May.

Jim's initial '*Caution*' was over **36 weeks ago**. Since that time, the market has increased by only about **5%**. It would have been a difficult trading time with erratic price movements, poor conversion results from Jim's '*Alerts*' and little net gain.

In our recent extensive series of articles of '*behind the scenes*,' Jim has shown, since that Caution, the majority of those shares which gave an entry signal after an Alert subsequently resulted in losses.

This confirms the importance of the power of Jim's lead of winding back positions and progressively switching to cash once he gave his April Caution Signal, rather than pressing on trying to '*swim against the tide*' in an attempt to beat the odds of failure.

Jim continues to monitor and back-test local and global markets and intends to re-open the Portfolio and launch the new Signals Services – as soon as he considers the market conditions improve sufficiently to result in a higher degree of probability of success.

## 2) How The Signals Will Operate

The following is an extract from Edition 435 of our [weekly Newsletter](#):

**Q1. Can you explain more about how the Signals will operate:**

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**A:** Each night, Jim will analyse the market in detail and, for Signals Members, post his updated entry **and** exit signals for these two new Services:

1. **Trading Signals** - short term trades, managed with daily charts and expected to last a few days to a few weeks and
2. **SMSF Investing Signals** - longer term trades, managed primarily with weekly charts (but also monitored for potential emergency exits using daily charts) and expected to last a few weeks to months, if rising trends continue.

Any shares which give an entry signal will be monitored by Jim and their progress will be posted in a Master spreadsheet, until they give an exit signal. Such exit signals will also be posted in the main Exit Signals Logs.

**Q2:** *Will you be advising the specifics of each signal when and how it is confirmed?*

**A:** Specific reasons for entry will be based on Jim's weight-of-evidence, together with extra filters, so detailed reasons for entry will not be listed. Entries ready for the following session will be posted in the Entry Logs, once they pass all of Jim's entry rules.

Exits ready for the following session will be posted in the Exit Logs, along with the reason for Exit, e.g. Initial Stop, Trailing Stop, Emergency Stop (for SMSF Investing Signals) and for Trading Signals - Adjusted Stop, Profit Target, JB Profit Taker, as taught in this Newsletter and our other resources.

**Q3** *Will you have provision for suspending the service by subscribers e.g. if they go on holidays or when we have another bear/caution market and there are no confirmed signals?*

**A:** Behind the scenes, Jim is currently back testing possible instruments - with an aim to be able to introduce Entry and Exit Signals - to make money in falling markets.

Membership to these new Signals Services will only be available to individual Newsletter Members. There will be no lock in contract, so Signals Members will be able to cancel at any time.

However, for liquidity reasons, membership numbers will be limited, so we expect there will be a waiting list of new members to replace those who leave.

During this year, we have been progressively compiling a list of those who have expressed interest to be informed of these new Signals Services.

### **3) New ! International Signals**

As part of the '*behind the scenes*' back testing we have been doing in recent months, we have looked at the Liquidity available to be able to buy and sell large numbers of shares, once entry and exit signals have been given. This research has shown that Liquidity may be an issue for some Australian companies from time to time.

In addition, Jim has continued to test the success of his trading strategies for equities in the USA market.

Combining the two together, we have decided to introduce a combination of Australian shares **AND USA stocks** within the Signal Services when we launch.

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This will allow us to:

- i) Have a wider range of shares for potential Signals at anytime
- ii) Add the scope of having stocks in one country to look at while a 'Caution' notice is in place in another market
- iii) Optimise any potential Liquidity issues
- iv) Increase the number of instruments available to trade in falling markets, for those who prefer not to go to cash

We also leave the door open to maybe considering other international markets, from Asia to Europe, should the need arise in the future.

#### 4) New Trading Platform and Advisor-Assisted Facility

Our two Signals Services will be aimed for both new and experienced traders as educational tools - to enable you to find and actively manage your potential ASX trades and to minimise your losses.

If you decide to physically trade or invest in the market, then we also want to provide you with the maximum flexibility in how you physically place your trades.

That's why today we announce our new Trading Platform and Advisor-Assisted Facility.

We wanted to create for you the freedom to be able to:

1. **Trade International Signals** – should you choose, in addition to Australian signals (*see 2) above*)
2. **DIY Online** – to be able to place your trades yourself online and an
3. **Advisor Assisted Facility** – to have access to a professional Advisor who:
  - a. You can phone to place your buy and sell orders when you are busy or away from a trading screen and
  - b. Can also call you (*as an optional service for Signals Members*) to discuss whether you want to enter any new Signals positions

The choice of Advisor was easy, as we have been Authorised Corporate Representatives of **Avestra Capital Pty Ltd** for almost 2 years. During that time, we have been and remain comfortable with all our dealings with their Management and staff.



Avestra Capital's approach to financial services is centred around transparency and service with a focus on delivering best practice services that comprehensively address the needs of individual clients.

Avestra Capital is an Australian boutique investment advisory and online trading firm with offices in Sydney, NSW and Broadbeach, Queensland. Avestra Capital provides financial, advisory and funds management services directly and through established relationships with some of the most trusted names in the industry.

Avestra Capital has set out to achieve ambitious growth targets by acquiring a team of experienced industry professionals to advise and assist clients manage their investment portfolios.

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Avestra Capital also caters to clients who prefer to navigate their own path with a host of online trading platforms and access to an extensive range of securities including CFDs, Equities, Options, Futures and Forex both locally and internationally.

Our main criteria for the choice of trading platform were:

1. Easy to use
2. An effective global platform to execute to trade USA and other international markets from one account
3. State of the art technology and reporting
4. Join for free, so you only pay when you trade -- and at
5. Very competitive transaction costs



We selected **Interactive Brokers'** ('IB') trading platform, for their Trade Experience and Technology, Usability, Range of Offerings, Research Amenities, Portfolio Analysis & Report, Customer Service & Education and Costs.

Interactive Brokers earned a 4.5 star ranking in the March 11, 2013 Barron's Annual Best Online Brokers.

### Why use interactive brokers?

" For 36 years the IB Group has been building electronic access trading technology that delivers real advantages to traders, investors and institutions worldwide. Interactive Brokers Group and its affiliates' equity capital exceeds \$5 billion. We are the largest US electronic broker based on daily average revenue trades executing 471,000 trades per day.<sup>3</sup> Discover some of the reasons why professional traders and investors choose IB.

Interactive Brokers offers the following benefits:

- ✓ Rated Best Online Broker for the Second Year in a Row by Barron's 2013
- ✓ Global offerings
- ✓ Account protection
- ✓ Comprehensive reporting
- ✓ Access account management
- ✓ Superior trading tools including mobile devices
- ✓ 24 hour support
- ✓ Strength and security"

Transaction costs using Avestra/Interactive Brokers will be as follows:

#### a) For Australian shares:

##### 1. DIY Online Trade Placement:

\$19.95 for trades up to \$18,000 then 0.11%

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## 2. Advisor Assisted Facility (*Placement by Phone*)

Trades	up to \$15,000	\$15,001 – \$55,000	\$55,001 - 1 million	over 1 million
Rates	\$69.95	0.40%	0.35%	0.13%

### b) For American shares:

	Rates	
Same price for DIY or Advisor Assisted Facility	Minimum	Maximum
	\$25	0.50%

Because US shares are based on a per share basis, generally speaking any share purchased over say \$40 -50 will be the minimum ticket value, given the average client account size.

We have managed to set a cap that will ensure clients will not be charged more than 0.5% of the trade value plus exchange fees.

This ensures that we are extremely competitive to other US trading platforms in Australia, particularly as *others' published rates often exclude extra fees*, such as Custody fees and currency exchange fees of up 0.6%, which all add to their clients' costs.

## 5) Why Choose Avestra's Advisor Assisted Facility?

**Please note:** if you open an account with Avestra, **there is no commitment to use their Advisor Assisted Facility.**

You will have the ability to choose to DIY, i.e. to place your trades yourself using IB's Platform.

So an important question you may have is; "*Why choose Avestra's Advisor Assisted Facility?*"

- ✓ Many people do not have the time to place their trades themselves. As a DIY client with us, you will also have the ability to easily call Avestra's Advisor Assisted Facility should your life get 'too busy' and you need help to place any of your trades over the phone.
- ✓ Avestra's Advisor Assisted Facility will reduce the risks of you making an error while executing the trade yourself and help you eliminate emotional trading (e.g. not holding on to losing trades.)
- ✓ Existing relationship with STE: Avestra's advisors have an understanding of how JB's Signals Services work, including account management and position size.
- ✓ As Avestra Advisors will be receiving JB's Signals, they can also contact Signals Members (should you elect), within a short time after the Signal is received.
- ✓ You will also be able to use this new initiative for trade placement for any of your other trading or investing requirements.

**Advantages** of utilising Avestra's Advisor Assist therefore include:

1. Avestra's Advisor Assist is *cheaper than to Do It Yourself* (DIY) compared with other major online competitors' DIY rates (e.g. E\*Trade / CommSec) for US securities
2. No Data Platform Fees
3. No execution risk to you as the client
4. Complete customer support

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When we release Jim Berg's new Signals Service, **there will be no obligation to switch from your existing trading platform/broker.** However, if you are:

- A. Are looking to set up a new account, or
- B. Already have an existing account which you would like to switch, or
- C. Would like to trial this new Facility, with a portion of your existing capital

and if you are attracted to the benefits of

- ✓ Using IB's platform and also
- ✓ Having the ability to call upon Avestra's Advisors to assist you with your trade placement from time to time

then we invite you to open your account(s) with Avestra.

This will allow you to completely familiarise yourself with how to use IB's platform and to position yourself, so that you:

- ✓ Will be fully prepared when Jim launches our new Signals Services for Australia and America.
- ✓ Can also trade any of your other trading or investing capital.

**Please refer to Appendix A (see below) for some more Q&A.**

Then, if you have any other queries on this initiative, please contact Rodney Steele or Dean Smith at Avestra on Ph.: 1300 882 402 or +61 7 5555 8500

To open your account with Avestra and Interactive Brokers, simply go now to:

<http://www.avestracapital.com.au/contact-us/open-an-account/ste/>

## 6) Signals Expressions of Interest

As the number of Signals Members to be admitted will be limited, we are compiling an EOI List of those who would like to express an interest in Jim's new Signals Services.

**If you have not yet contacted us** and would like us to add your name to that Expressions of Interest List - so that you will be one of the first to be notified, please:

- ✚ Email us at [Info@ShareTradingEducation.com](mailto:Info@ShareTradingEducation.com)
- ✚ Leave us your name & email and type in the subject line, which Service(s) you could be interested in, i.e. "Trading", "SMSF" or "Both"

We will then contact you with further details, as soon as Jim decides to launch these two new upcoming Signals Services.

May you trade with *'Weight-of-Evidence,*

Jim Berg and his ShareTradingEducation.com team  
19 December 2013



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# Appendix A

## Extra Q & A

### Q1: "Must I join **both** Signals Services?"

The Signals Services will be available only to Newsletter Members who remain current. Subject to places being available at any given time, it will be your choice whether you become a Member of:

- Jim's trading signals **or**
- His SMSF Signals **or**
- Both Services

The Signals will *only be available to individuals and will be for personal use only.*

For commercial and copyright reasons, all brokers, advisors, media and any other entities involved in the financial industry will be strictly prohibited from using these Signals in any way, without prior approval from ShareTradingEducation.com Pty Ltd.

\*\*\*\*

### Q2: "To become a Signals Member, do I also have to switch broker accounts?"

When we release Jim Berg's new Signals Service, there will be **no obligation to switch** from your existing trading platform/broker.

Avestra is our preferred broker for all the positive reasons listed above, so we leave it to you to assess the benefits of using them.

*If you do choose to open an account with Avestra:*

- a. It will be your choice whether you place your own trades online (DIY) or take advantage of their phone service – for some or all of your trades.
- b. Setting up usually takes a few days to organize (or sometimes a few weeks for SMSFs). Once your account has been opened, you will have 40 days to transfer funds into it and make your first transaction. If you do not trade within 40 days, your account will be set to 'dormant'. It can be easily reactivated/re-established later, usually within about 1-2 days.
- c. It makes sense to set it up now - so that you are ready to go when Jim launches his Signals Services and will not miss out, particularly for trading both USA and ASX stocks from one account.

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**Q3:** *"What if I don't want to trade international securities?"*

It is completely up to the individual to choose whether to trade international shares or not.

On Page 3 we list the reasons why Jim chose to introduce international shares including to; "*...Increase the number of instruments available to trade in falling markets, for those who prefer not to go to cash*" and to "*... add the scope of having stocks in one country to look at while a 'Caution' notice is in place in another market.*"

For instance, re the latter reason: if International signals were available during 2013, those who were set up to trade them could have taken advantage of the rising US market while Jim had a caution on ASX shares – i.e. the USA portion of the Signals would have been open while the ASX portion would have been closed from April on.

\*\*\*\*

**Q4:** *"What about exchange rate fluctuations?"*

**A:** This is a factor to be considered when trading overseas markets, in that the value of your shares may increase, but fluctuations in the value of the dollar could have a negative impact on your portfolio value.

Correspondingly, they could work positively in your favour too!

Alternatives may include:

- Some traders/investors may watch the trend in exchange rates and trade only when they consider the dollar should benefit them.
- Others may elect to pay to protect their portfolios through currency hedging, which may be arranged through Avestra.
- Many traders/investors may choose to take the risk on exchange rate fluctuations over time, in the expectation of a long term neutral *'swings and roundabouts'*, such that the benefits in trading international markets results in capital growth which exceeds fluctuation differences overall.

Currency risk will be noted as part of the international signals nominated by Jim Berg, then Avestra will execute instructions, as nominated by each client.

\*\*\*\*

**Q5:** *"Are American shares, settled and protected in a similar fashion to Australia?"*

**A:** In Australia, most trading platforms settle Australian shares to a CHESSE sub register, with a Holder Identification Number (HIN) and separate individual accounts for depositing cash.

Overseas this is not usually the case. Typically, shares are settled into what is known as *'Custodial Accounts'* and cash is deposited into pooled sub-accounts.

This arrangement implies additional risk if the broker should go into liquidation. To allow for this, Interactive Brokers has insurance in place to protect \$250,000 of cash in any sub-account or \$500,000 of shares.

Additional insurance cover is available at a cost. As an alternative, Avestra recommends that clients with more than \$250,000 consider the setting up of multiple accounts with \$250,000 value.

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Interactive Brokers LLC has reported solidly positive earnings for the past 18 consecutive years.

Interactive Brokers LLC is rated '**A-/A-2**'; **Outlook Stable** by Standard & Poor's, as shown in the following Table:

S&P Credit Ratings Comparison <sup>1</sup>		
Broker Dealer	Rating	Outlook
JPMorgan Chase & Co.	A	Negative
<b>Interactive Brokers</b>	<b>A-</b>	<b>Stable</b>
Bank of America Corporation	A-	Negative
Citigroup Inc.	A-	Negative
Goldman Sachs	A-	Negative
Merrill Lynch & Co., Inc.	A-	Negative
Morgan Stanley	A-	Negative
Jefferies	BBB	Stable

For more details on the strength and security of IB, [Click Here >>>](#)

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## Become a Student of Jim Berg's common sense trading & investing approach so you will know:

- ✓ **WHICH** stocks / shares to Buy
- ✓ **WHEN** to Buy and, most importantly
- ✓ **WHEN** to SELL

This is **NOT** a publication of general commentaries or articles on how the stock market works, leaving you without a track to follow.

In contrast, every weekly Edition of the ['Investing & Online Trading'](#) Newsletter will:

Teach you how Jim Berg thinks and **how he trades his own money**, step-by-step and



Provide you with **Jim's own Watch Lists** of shares / stocks to help you identify potential new trading opportunities

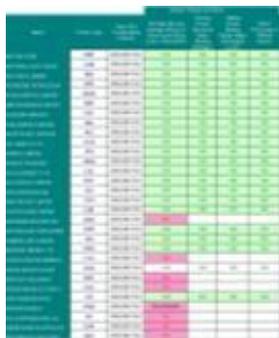


That's why our Members are not simply newsletter 'readers'. We prefer to regard them as 'Students' - in pursuit of profound and specialist knowledge:

- 1) To **create additional income** in the short term and
- 2) Ultimately, the skills and capital needed to be able to **trade / invest for a living** and achieve financial independence.

**Special Offer:** Become a Member of Jim's mentoring-style Newsletter today and you will also gain instant access to download your **FREE Bonus Welcome package, worth \$194:**

**Free Stock Selection Tool**  
(*\$97 value*)



**Free Trading Plan Guide:**  
(*another \$97 value*)



*There is no lock-in contract, so **you may cancel at any time.***

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