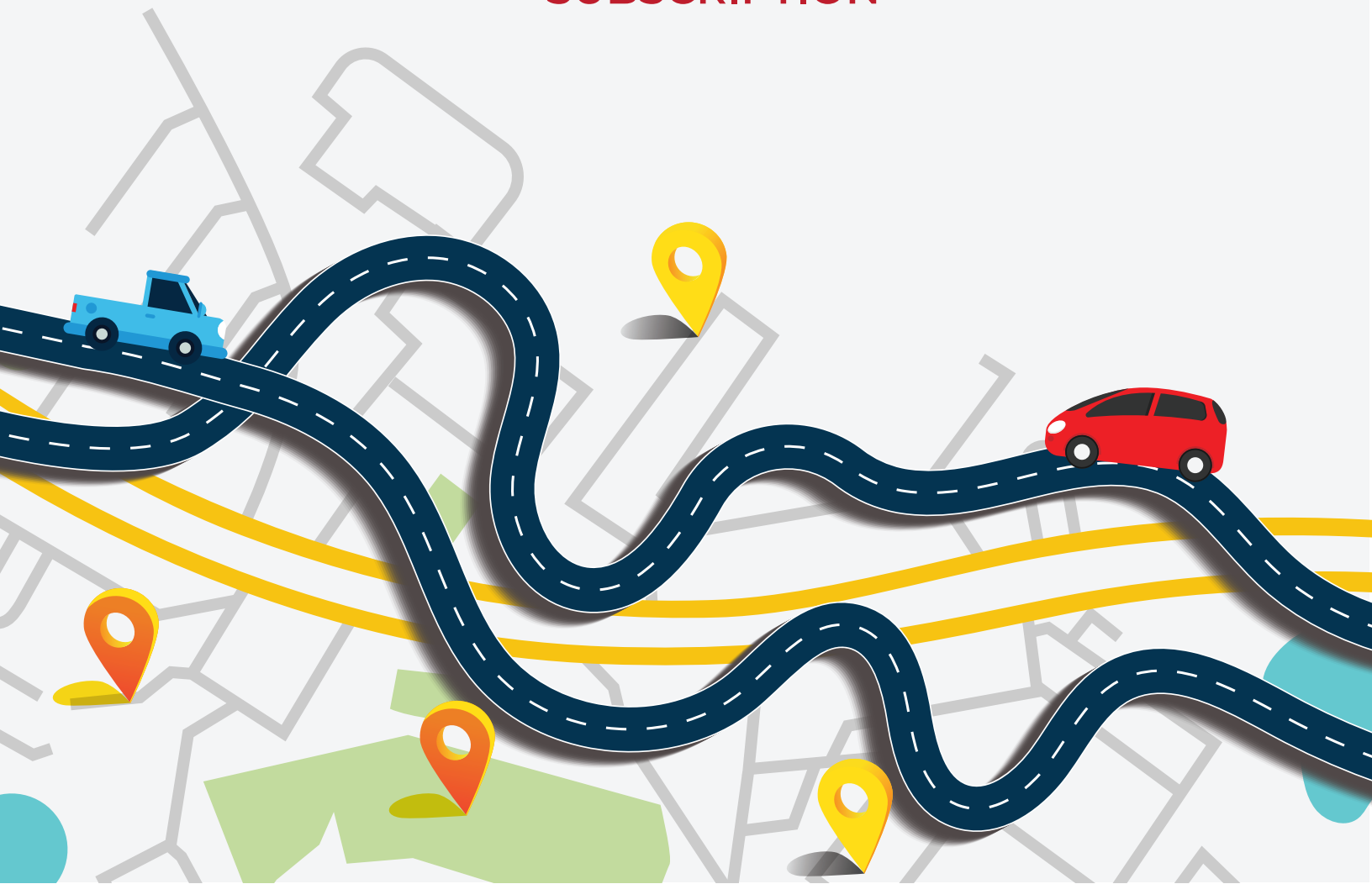




# 6-Month Roadmap

YOUR GUIDE TO SNIDER INVESTMENT  
METHOD ONLINE COURSE  
SUBSCRIPTION



# The Purpose of this Roadmap

Our 6-Month Roadmap gives you a big picture of what you can expect when you participate in the Snider Investment Method Online Course. We want to get you up-to-speed and engaged in the investing process so that you start using your portfolio right away, as well as maximize the resources and tools available to you in this learning experience.

You will start in Month 1 with the basic steps of the Snider Investment Method. The course was designed so that you can go from zero investment experience to successfully applying the Snider Method within the first 30 days.

In each of the following months, you will receive bonus lessons that take a deep dive into particular concepts and steps. You will also be able to join us each month for live, online office hours. These sessions are designed to be a platform for you to ask questions and get feedback.

Your online course enrollment includes a one-on-one, personalized financial planning session with one of our advisors. We encourage you to take advantage of this opportunity to make sure you are on track for financial success.

We are delighted you are interested in the Snider Investment Method Online Course subscription. We believe the Snider Method is the best, most comprehensive strategy for generating a monthly paycheck from your portfolio and preserving your principle so you can enjoy a financially secure retirement.



# Month 1:

## Getting Started and Core Snider Method Concepts

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In the first month of the online course subscription, you will learn all the steps you will need to know to be able to implement the Snider Investment Method in your own portfolio. You will also receive additional training in option trading, stock selection, and setting up your brokerage account.

## MONTH 1:

# Month-at-a-Glance

- ☐ Participate in Online Office Hours: March 30th
- ☐ Complete lessons: 12 Lessons, approximately 3 hours (Month 1 lessons will be released: March 30th)
- ☐ Set-up and fund brokerage account
- ☐ Establish Lattco Account
- ☐ Place your first trades
- ☐ Attend Live Workshop: April 21st at the Westin DFW Airport, 8:00 a.m.to 5:00 p.m.

## KEY POINTS

Timing is an important component of the Snider Investment Method.

The first time you trade your Snider Method account, you can do it any day of the month. After that, you will trade based on the option expiration cycle. Options expiration is typically the third Friday of each month.

We recommend that you trade on (or close to) the Monday following options expiration. We call this Trade Day. You should trade during market hours (8:30 a.m. – 3:00 p.m. CT).

One of the benefits of the Snider Method is that it does not require you sit in front of your computer day in and day out. In fact, you will only trade one day each month. The rest of the month, we recommend that you spend your time enjoying your life, or as we say, “going to Bora Bora!”



# Month 2:

## Your First Options Expiration

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The focus in Month 2 is on the role options play in the Snider Method. You'll review possible option expiration outcomes and receive training on the exact steps you will take if a call or put you sell is exercised.

## MONTH 2:

# Month-at-a-Glance

- ☐ Schedule and attend one-on-one portfolio review
- ☐ Participate in Online Office Hours: April 18th
- ☐ Trade account:
  - Options Expiration: April 20th
  - Trade Day: April 23rd
- ☐ Complete lessons: 4 Lessons, approximately 1 hour  
(Month 2 lessons will be released April 26th)

## KEY POINTS

Lattco is Snider Advisors proprietary, online stock selection and portfolio management tool, available exclusively to Snider Advisors' clients. There are three levels of Lattco, each offering a progressively higher level of trading technology. Your online course subscription includes access to all three levels at no additional charge.

### **Lattco Basic:**

Use with ANY Broker  
Generate New Positions

### **Lattco PRO:**

Use with Ally or Fidelity  
Generate New Positions  
Automated Bookkeeping

### **Lattco AutoPilot:**

Use only with Ally  
Generate New Positions  
Automated Bookkeeping  
Automated Trading



# Month 3:

## Continuing Trades, Snider Investment Philosophy

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In addition to a review of the process of how to continue your Snider Method trades, in Month 3, you will get a purposeful examination of the guiding principles and philosophical cornerstones of the Snider Investment Method.

## MONTH 3:

# Month-at-a-Glance

- ☐ Participate in Online Office Hours: May 16th
- ☐ Trade account:
  - Options Expiration: May 18th
  - Trade Day: May 21st
- ☐ Complete lessons: 4 Lessons, approximately 45 minutes  
(Month 3 lessons will be released May 24th)

## Snider Advisors Support

Snider Advisors offers ongoing support. You will be able to contact us anytime you have questions about the online course, your trades, setting up your accounts, or just about anything else. We are always happy to help.

### Snider Advisors Contact Information:

**Email:** [support@snideradvisors.com](mailto:support@snideradvisors.com)

**Phone:** 214-220-0055

**Toll-Free:** 888-676-4337

**Live Chat:** [www.SniderAdvisors.com](http://www.SniderAdvisors.com)

**Address:** 100 Decker Court Suite 120  
Irving, TX 75062

Office Hours 8:00 – 5:00 CT





# Month 4:

A Deep Dive into Puts and the Band Rule

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Month 4 offers you a detailed look at when and why we sell puts in the Snider Investment Method, as well as what happens when they are assigned.

## MONTH 4:

### Month-at-a-Glance

- ☐ Sign up for Lattco AutoPilot
- ☐ Participate in Online Office Hours: June 13th
- ☐ Trade account:
  - Options Expiration: June 15th
  - Trade Day: June 18th
- ☐ Complete lessons: 3 Lessons, approximately 1 hour  
(Month 4 lessons will be released June 21st)

### Snider Advisors Additional Services

Snider Advisors offers a variety of services to help you get and stay on track to financial success. We can help you with:

- IRA Rollovers
- Account Consolidation
- Required Minimum Distributions
- Social Security Planning
- Financial Planning
- Income Distribution Strategies
- Insurance Review
- Asset Management



# Month 5:

## All About Bundling

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Bundling is one of the most powerful strategies in the Snider Method. It is the technique that allows you to generate income even when there is a precipitous decline in a stock's price. Month 5 is your chance to become a Bundling expert

## MONTH 5:

# Month-at-a-Glance

- ☐ Evaluate results and add additional funds if you started with test amount
- ☐ Participate in Online Office Hours: July 18th
- ☐ Trade account:
  - Options Expiration: July 20th
  - Trade Day: July 23rd
- ☐ Complete lessons: 2 Lessons, approximately 1 hour (Month 5 lessons will be released July 26th)

## Snider Method Objectives

The Snider Method has two objectives:

Consistent monthly cash flow. Our goal is to generate a monthly cash flow as close to 1% of our total investment as possible. We don't select stocks because we think we know the future direction of their price, but rather to use them to generate income.

No permanent loss of capital. The Snider Method has you buy fundamentally sound companies you would be willing to own for long periods of time, even if the price declines.



# Month 6:

Emotions, Mistakes, Unique Situations, & Moving Forward

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In Month 6, you wrap up the online course with a thorough understanding of what it takes to be a successful investor. You will become well-versed with how to handle unique situations like mergers or acquisitions, as well as how to manage your own emotional reactions to market movements.

## MONTH 6:

# Month-at-a-Glance

- ☐ Participate in Online Office Hours: August 15th
- ☐ Trade account:
  - Options Expiration: August 17th
  - Trade Day: August 20th
- ☐ Complete lessons: 2 Lessons, approximately 1 hour  
(Month 6 lessons will be released August 23rd)
- ☐ Tell a friend about the next online course

## Disclosures

Chronim Investments, Inc. d/b/a Snider Advisors is an SEC-Registered investment advisor.

Past performance is no guarantee of future results. All securities involve risk and may result in a loss. Investors should consider their investment objectives, risks, charges, and expenses of the Fund/Portfolio carefully before investing. Historical and expected returns, as well as future projections may not reflect actual future performance.

Investments are Not FDIC Insured and provide No Bank Guarantee.