



EDUCATIONAL OFFERINGS & PRICING

Updated 4/25/2024

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OVERVIEW

Palm Street Consulting LLC offers in-person and live video classes and tutoring for business, finance, and investing for kids (ages 10 to 18) and adults. In addition, we have a curated list of offerings on the Outschool education platform for learners ages 10 to 18. We also share our knowledge on our investing blog, [The Wall Street Basement](#), hosted on our website.

100% guarantee: If you are unsatisfied with our services, we will give you a free class/session or your money back.

BRIEF HISTORY

We are a Boston, Massachusetts headquartered investor education company. We began operations in 2020 as a financial risk consulting company helping small and medium banks implement a new accounting standard – Current Expected Credit Loss (CECL). As the industry completed CECL implementation, we transitioned into an investor education company in 2022. We taught our first learner in March 2022 on the Outschool education platform. As of March 2024, we taught over 400 classes and have [over 100 reviews](#) on the platform. We are expanding our reach by offering in-person education, accepting adult learners, and covering investing related subjects.

CLASSES

Our in-person and live video classes are targeted for 55 minutes. We teach using lesson slides and frequently pause for open-ended discussion to reinforce learner knowledge and critical thinking. After class, we provide the lesson slides, which include answers to discussion questions, and a detailed glossary to help learners keep their newfound knowledge. Learners will maximize their classroom experience by coming to class ready to ask questions, discuss topics, and engage in learning without distractions.

We offer five classes for learner enrollment:

- 1.0: The World of Investing
- 1.1: Introduction to the Stock Market
- 1.2: Stock Investing: Understanding Stock Information
- 1.3: Stock Investing: Understanding Risk
- 1.4: Stock Investing: Understanding Investing Styles

Please see the class description section for a detailed information about each class. Pricing information is available in our pricing section. Contact Adrian Wong directly for questions and enrollment: awong@palmstreetconsulting.com or 857-302-5832 (U.S.).

TUTORING

Our private in-person and live video tutoring services help learners achieve their educational goals. Our tutoring goals include

- Knowledge Building
 - Explore topics
 - Build new skills
- Academic Success
 - Improve class grades
 - Progress assignments, projects, and case studies
- Professional Development
 - Pass certification exams (ex. Chartered Financial Analyst (CFA) exam)
 - Progress work tasks, initiatives, and presentations

Our expertise includes

- Personal Finance: Budgeting, Investing, Wealth Management
- General Business: Business Law, Entrepreneurship, Marketing, Operations, Planning
- General Economics: Microeconomics and Macroeconomics
- General Accounting: Managerial, U.S. GAAP, and IFRS
- Finance: Investment Products, Corporate Finance
- Investments: Analysis, Risk, and Management

For in-person tutoring we currently serve the following Massachusetts, U.S. communities:

- Wellesley
- Weston
- Wayland
- Natick
- Dover
- Needham
- Newton

Our tutoring relationship follows this template:

1. Develop a tutoring plan based on your goals and concerns
2. Integrate the plan into our sessions
3. Reinforce tutoring gains between sessions with one or more of the following:
 - a. Session notes
 - b. Homework
 - c. Exercises
 - d. Other activities
4. Evaluate progress
5. Repeat as needed

We accommodate group tutoring sessions as well. Pricing information is available in our pricing section. Contact Adrian Wong directly for questions and enrollment: awong@palmstreetconsulting.com or 857-302-5832 (U.S.).

OUTSCHOOL

Our Outschool education platform offerings mirror our tutoring offerings, but are only available for learners ages 10 to 18. We list the same five classes as public small group (up to 18 learners) and self-paced classes. Public group classes are pre-scheduled live video classes open for all to enroll. Self-paced classes are for learners who prefer to watch a pre-recorded lesson video at their convenience. Last, we have live video Private 1:1 tutoring.

Contact [Adrian Wong through Outschool](#) if you want to enroll in private 1:1 tutoring or public small group classes as a private 1:1 or private group session.

Pricing information is available in our pricing section.

PRICING

Class rates are for each class. Each class lasts 55 minutes. Tutoring rates are per hour. In-person prices reflect Palm Street’s travel time.

Classes & Tutoring

		Subject Level			
		Ages 10 to 14	High School	Adult	Bachelor, Master, Professional
1:1 Class	Live Video	\$30	\$30	\$30	
	In-Person	\$40 to \$55	\$40 to \$55	\$40 to \$55	
1:1 Tutoring	Live Video	\$70	\$75	\$80	\$85 to \$95
	In-Person	\$80 to \$100	\$85 to \$105	\$90 to \$110	\$95 to \$125

We offer per learner discounts for taking our 1:1 class or tutoring as a group.

Outschool

	Subject Level	
	Ages 10 to 14	Ages 15 to 18
Group Classes	\$22	\$22
Self-Paced Classes	\$20	\$20
1:1 Tutoring	\$70	\$70

Contact [Adrian Wong through Outschool](#) for pricing on group tutoring or taking public small group classes as a private 1:1 or private group session.

CLASS DESCRIPTIONS

1.0: THE WORLD OF INVESTING

Prerequisites: No previous experience or knowledge needed.

The World of Investing class will begin the investing journey by exploring the following topics:

1. What is Investing?
2. An Investor's Team and Making a Living
3. Investing: Success Factors and Challenges
4. Common and Alternative Investments
5. Investing: Role in Society, Art vs. Science

During the lesson, there will be a case study to help learners understand the role investors have in organizations. My teaching philosophy is to introduce the essence of an investor and their place in the world. Building this understanding will better ground learners in future studies of the stock market, investment analysis, and investing strategies.

Next Class: Introduction to the Stock Market

1.1: INTRODUCTION TO THE STOCK MARKET

Prerequisites: Learners should have a simple conceptual understanding of investing and how a business makes money.

In the Introduction to the Stock Market class, learners will find the answers to the following questions:

1. What is a stock?
2. What is a stock market?
3. What can you trade in the stock market?
4. How does the stock market work?
5. Why do we need the stock market?
6. How do you measure stock market health?
7. How do you research a stock?

During the lesson, we will also see a real-world example. My teaching philosophy is to help learners understand why the information is important and how it can be used. Understanding the structure of the stock market allows learners to better understand its contribution to many investment strategy outcomes.

Next Class: Stock Investing: Understanding Stock Information

1.2: STOCK INVESTING: UNDERSTANDING STOCK INFORMATION

Prerequisites: Learners should have the following knowledge: a simple understanding of investing, how a business makes money, what is a stock, and how the stock market works.

In the Stock Investing: Understanding Stock Information class, learners will explore the following topics:

1. Stock Tickers
2. Stock Statistics
3. Placing a Trade
4. Reading a Stock Chart
5. Discovering What Moves Stock Prices

There will be a case study to illustrate how to read and interpret stock movements. Although a segment of investors relies on charts and technical analysis to make their investing decisions, the case study and class provide several perspectives. My teaching philosophy is to help learners understand why the information is important and how it can be used (sometimes in multiple ways). With the knowledge from this class, learners are better prepared to research stocks and continue their studies in stock investing.

Next Class: Stock Investing: Understanding Risk

1.3: STOCK INVESTING: UNDERSTANDING RISK

Prerequisites: Learners should have the following knowledge: an understanding of investing, what is a stock, how a business makes money and competes.

In the Stock Investing: Understanding Risk class will explore the following topics:

1. What is Risk?
2. Measuring Risk
3. Managing Risk
4. Risk: Static or Dynamic?
5. Risk vs. Reward
6. Managing Stock Portfolio Risk

The case study follows a company's journey in risk and provides a real-world example. My teaching philosophy is to focus on broad principles and key takeaways of risk and risk management. Learning about risk will better ground learners in the complexities of investing.

Next Class: Stock Investing: Understanding Investing Styles

1.4: STOCK INVESTING: UNDERSTANDING INVESTING STYLES

Prerequisites: an understanding of investing, what is a stock, how a business makes money and competes, awareness of what moves stock prices, and a casual understanding of stock investing risks.

The Stock Investing: Understanding Investing Styles class will introduce learners to a broad range of investing styles:

1. Analysis: Fundamental (Growth & Value) vs Technical
2. Approach: Top-Down (Macro) vs Bottom-Up (Micro)
3. Information Processing: Qualitative vs Quantitative
4. Time Horizon: Short vs Medium vs Long
5. Temperament: Aggressive vs Defensive

During the lesson, there will be a case study to dissect a famous investor's style. My teaching philosophy is to show the breadth of stock investing styles and their key takeaways instead of detailing individual style strengths and weaknesses. Building this foundation will better prepare learners for future studies in specific investing styles and learning about other famous investors.

Next Class: Tutoring