

CASE STUDY

Richard Suthon

Age: 39

Occupation: Software Development



What challenges/problems were you having with your investing that necessitated a change?

I was interested in stocks and trading, but was confused by the myriad of options and different strategies, and didn't know where to start. Selection of stocks, how to actually place trades, the mechanics of various platforms and broker accounts seemed all very complex and I didn't have the time or knowledge to make decisions on how to get started without putting capital at significant risk. I am also an analytically minded person, so the process and type of trading fit my natural mentality.



What made our solution stand out over others that you researched?

The transparency of sharing positions placed was one of the key factors, together with the general culture and approach. I am very much a "learning by doing" person, so being able to watch the market and see what other more experienced traders were doing was a big factor in deciding to join the group. This helped me concentrate on the actual mechanics of placing trades with the correct risk, stop loss etc to ensure I was practically competent whilst learning how to evaluate trends and select stocks from the ST list. It was also clear that this was a coaching culture instead of a lecturing approach, which suits my personality better.

How did our team help with the learning and implementation of the methodology?

Learning in lockdown webinars were a big help in moving my education and confidence forward. This enabled us to ask questions individually and to ensure that we understood some of the complex compounding techniques and how to manage risk both in analysis and when placing positions.



The video lessons in very small / bite-size chunks is also a great way to learn for me - not too much saturation so easy to incorporate into the day job. The learning continues and it's good to see the ST system and methodology continues to develop along with its members.



How was the ongoing mentoring & what difference did it make with the learning and implementation?

- The weekly webinars and regular video analysis help you set up the routine and habits of analysis that are required to become a consistent trader. There have been developments in the programme to move members to more advanced techniques where appropriate, but there have also been times when some members are getting stuck and there is coaching and guidance to correct the thinking.
- Recent 121 sessions have also been very useful, particularly when the market is less favourable to ensure that managing of personal positions is in line with the strategy.
- The mentoring gives me the right mindset, along with other recommended additional resources like the recommended reading material. This is one of the most important personal developments that has taken place during my time in the community.

What % growth have you achieved to date to show the success you have enjoyed with our service?

Growth before the recent pullbacks was 83% increase in account (or 167% ROCE - i.e., cash invested / committed to stocks).



Currently running
33% (67% ROCE).



How will you use our solution going forward to grow your wealth?

- Keep compounding my growing pot. Add funds over time to further increase account size and increase long term wealth.
- Also looking into using my SSAS to invest while the property market is less predictable.
- Also looking into coaching my children into the process and mindset i have developed over time.

Investing in the financial markets remains one of the most popular ways for busy professionals to build wealth. The number one challenge however for those earning a decent salary is not being able to invest it correctly.

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