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SPECIAL REPORT:

20 Tips, Tactics
and Secrets
Every Investor
Needs to Know

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Eagle's 20th Anniversary Special Report 20 Tips, Tactics, and Secrets Every Investor Needs to Know

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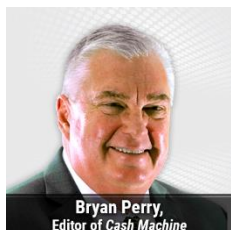
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Eagle's 20th Anniversary Special Report

20 Tips, Tactics, and Secrets Every Investor Needs to Know

This year, 2023, marks Eagle Publishing's 20th Anniversary. We here at Eagle Publishing value our customers, and it's been an honor to serve you all for the past 20 years. To celebrate this milestone, we've gathered a list of 20 investing tips, tactics, secrets, and strategies from our investment gurus here at Eagle. We hope this advice will help you on your own investment journey.



For over a decade, Bryan Perry has brought his expertise on high-yielding investments to his *Cash Machine* subscribers. In addition to *Cash Machine*, Bryan provides a supplemental trading service called *Premium Income*, which gives subscribers a unique way to generate additional income on the *Cash Machine* stocks using covered call options. He also offers several other trading services designed to maximize income generation while playing a variety of market trends: *Quick Income Trader*, *Breakout Options Alert*, *Micro-Cap Stock Trader*, *Premium Income PRO* and *Hi-Tech Trader*.

Bryan Perry:

1. When buying any call or put option, buy three times the amount of time in which you believe the trade will take to reach your profit goal. Murphy's Law can and will come into play where trades run into various obstacles, either specific to the underlying stock/ETF for the market in general.
2. Avoid the temptation of doubling down on losing option trades. More likely than not, the underlying security has probably breached an upside/downside technical level where any move back to the technical breakdown point should be used as a place to exit the trade.
3. Scour **Most Active Options** and **Unusual Options Activity** on www.barchart.com to see where the big money is placing the upside and downside bets. Huge call and put activity will act as catalysts for a stock's near-term direction.



For 13 years, Hugh Grossman has manned the helm of DayTradeSPY – making it one of the longest, continuously running trading rooms in the world. For more than a decade, Hugh has shared the same real-life, real-money options trades he’s made to get rich. In addition to the daily ***Trading Room***, there are two additional trading services called ***Pick of the Day*** and ***Inner Circle***.



Ahren has a passion for the markets and started studying them while still in his teens, focusing on research and market analysis. In addition to the daily ***Trading Room***, there are two additional trading services called ***Pick of the Day*** and ***Inner Circle***.

Hugh/Ahren:

1. **“The secret: there is no magic to options.** The essence of success is emotional control, learning to dance with the market. Achieve this state of mental authority and claim your reward.”
2. **“Tip: Don’t swing for the fences:** Our day trading strategy takes small bites out of the market starting with a modest investment. At the end of the day, those morsels add up nicely... and you’ll have fun doing it!”



Jon Johnson is the editor of *Investment House Daily*, *Technical Traders Alert* and *Success Trading Group*. His newsletters have been featured in various financial articles, including articles in *The Washington Post*, *Chicago Sun*, *The Wall Street Journal’s Smart Money Magazine*, *Bloomberg*, *Kiplinger Personal Finance Magazine*, *Houston Chronicle*, *Business Week*, *Money Magazine* and other news magazines.

Jon Johnson:

1. **“Take what the market gives: don’t try for more than is there”**
2. **“Know your trade’s numbers before you think about entering”**
3. **“Take partial profits and Remove the emotional governor on your profits”**



Mark Skousen, Ph. D., editor of *Forecasts & Strategies*, is a nationally known investment expert, economist, university professor and author of more than 25 books. Since 1980, Skousen has been editor in chief of *Forecasts & Strategies*, a popular award-winning investment newsletter. He is also the editor of four trading services: *Five Star Trader*, *Home Run Trader*, *Fast Money Alert* and *TNT Trader*.

He is the producer of FreedomFest, “the world’s largest gathering of free minds,” which meets every July in Las Vegas. (www.freedomfest.com). FreedomFest attracts several thousand people from around the world.

Mark Skousen:

My Simple “High Total Return Strategy” for Financial Success

1. **The secret** to a low-risk, high-return investment is to purchase investments that pay something back every year, whether it’s interest, dividends or rental income, such as:
 - a. **Safe Investments like CD, TBills** – used to be 1%, now one year for 4.5%, but money stuck.
 - b. **Real Estate – Rental income** – this is a business, it’s work.
 - c. **Other Passive Income:** I make money while I sleep – this can be compounding interest.
2. **F&S High Total Return Strategy:** Growth and income stocks paying 6-7% yields, plus double-digit gains this year: “**The key is** to find growing companies that are (1) profitable, (2) pay high dividends and (3) keep raising their dividends over the long term.” ~MS
 - a. **Jeremy Siegel**, the Wizard of Wharton, says something similar: “Dividends are **the critical factor** giving the edge to most winning stocks in the long run.”
 - b. I call it the “*lazy man’s way to riches.*” As **Jesse Livermore** states, “*The big money is not in the buying and the selling, but in the sitting.*”



Jim Woods is the editor of *Successful Investing*, *Intelligence Report*, *Bullseye Stock Trader*, *Woods' Wealth Alliance*, and *High Velocity Options*, his newest trading service. He is a 30-plus-year veteran of the markets with varied experience as a broker, hedge fund trader, financial writer and newsletter editor.

Jim Woods:

1. **“Stay Zen in the face of market tumult.** Mood swings will always level out into calmer market states.”
2. **“Be opportunistic, but not reckless.** Opportunities abound in any market, but you must be judicious and cautious, particularly now.”
3. **“Buy high, sell higher.** Past price performance is the No. 1 predictor of future price moves. Learn how to buy on strength in your tactical, short- and intermediate-term trades, and stop bargain hunting, or wishing a stock will live up to its “undervalued” status.”



George Gilder is leading his research team to publish several products with Eagle Financial Publications. In addition to *Moonshots*, George provides several other financial services: *Technology Report*, *Technology Report Pro*, and *Private Reserves*.

George Gilder:

1. **Use falling cyclical trends to buy rising secular trends (a nexus?).** Tech stocks go in and out of fashion, but the exponentially increasing importance of computation across the economy means demand, revenues, and stock prices always go up in the long term. My favorite Warren Buffett quote is “the stock market is a voting machine in the short run and a weighing machine in the long run.” That applies more to technology stocks than any area I can think of.
2. **Invest in technology products with the most rapidly falling prices.** Say’s Law, “supply creates its own demand”, is the governing principle of the

entire economy, but it is especially powerful in the microcosm—the realm of semiconductors and computation—and the telecosm: the realm of lightspeed communication. For more than 70 years every reduction in the cost of computing—driven by Moore’s Law—has increased demand as new uses become affordable and relevant. Every reduction in the cost of communicating a bit has increased demand. The million-fold reduction in cost has led to a multimillion-fold increase in traffic.

3. **Moore’s Law will never die because it is fundamentally an expression of the learning curve**, which dictates that with each cumulative doubling of volume produced costs fall some 20-30%. We are approaching the limits of how small we can manufacture circuits, but learning and innovation continues relentlessly across other dimensions. Processors a decade from now will be exponentially more powerful than today’s...but they may no be made in silicon because....
4. **Bonus tip: The fundamental enabling factor of technology progress is the science of materials.** The silicon era, enabled by dramatic advances in materials science will come to an end not because we stop innovating in silicon, but because materials science is even now giving us new arrangement of atoms that will compute at more than 10x the speed and power of silicon while generating not a fraction of the heat. Near-room-temperature super-conductivity imminent, cancer has been given a death sentence, the lame will walk, the deaf will hear, and the blind will see. You ain’t seen nothin’ yet.



Bob Carlson is editor of the monthly newsletter and website, [*Retirement Watch*](#). His latest book is the revised edition of “The New Rules of Retirement” (Wiley, 2016; first edition 2004). He has written numerous other books and reports, including “The New Rules of Estate Planning,” “Securing Your Lifetime Stream of Income,” “Tax Wise Money Strategies, Retirement Tax Guide,” “How to Slash Your Mutual Fund Taxes,” “Bob Carlson’s Estate Planning Files” and “199 Loopholes That Survived Tax Reform.”

Bob Carlson:

1. **Cash Management Makes a Comeback:** Cash management is the practice of earning a decent yield on money, taking little or no risk, and maintaining liquidity by not locking the money up for an extended period. By early 2023, an annual yield of around 5% could be earned in very safe and liquid money market funds. A slightly lower yield could be earned in super-safe treasury notes or a money market fund concentrated in them. With yields on liquid and safe money market funds competitive with certificates of deposit (CDs) and other investments that aren't as liquid, it makes a lot of sense to once again keep cash and even the bond portion of a portfolio in money market funds. If you have more cash in a checking account or similar account than is needed to pay anticipated expenses over the next month or two, look into transferring that cash into a money market fund at your broker or mutual fund company. Replenish the checking account every month or so by transferring cash from the money market fund.
2. **Save Your 2023 Charitable Gift Receipts, Just in Case:** You might be able to deduct charitable contributions even if you don't itemize expenses on Schedule A filed with your income tax return. During the pandemic, Congress allowed people who don't itemize expenses to deduct on the first page of their tax returns up to \$300 of charitable donations. The amount was increased to \$600 in 2021 for married taxpayers filing jointly. That provision expired at the end of 2021, but a bipartisan group of 11 senators proposed restoring the charitable contribution deduction for taxpayers who don't itemize expenses. In addition, the senators propose increasing the deduction limit to one-third of the standard deduction. That would put the limit in 2023 at \$4,600 for single taxpayers and \$9,200 for married taxpayers filing jointly. The proposal is something of a long shot, but you should keep receipts from 2023 charitable contributions in case it is added to a tax bill later this year.
3. **There Are Four Ways You Can Make Tax-Free Gifts:**
 - a. **Qualified education and medical gifts** are unlimited when made directly to the education or medical provider and meet other qualifications.
 - b. Gifts that don't qualify as education or medical gifts might qualify for the **annual gift tax exclusion**, which is \$17,000 per recipient. The limit is indexed for inflation annually but increases only in \$1,000

increments. The gifts must be of present interests with no limits or retained rights.

- c. The **lifetime estate and gift tax exemption** amount in 2023 is \$12.92 million. In a married couple, each spouse has a separate \$12.92 million exemption for a combined \$25.84 million exemption.
- d. **Gifts to a spouse** either during life or through your estate are tax free with no limit. The tax on taxable gifts can be reduced in many cases by using sophisticated strategies that reduce the value placed on gifts, such as grantor annuity trusts, family limited partnerships and more.

We hope that you've enjoyed these special tips. Thank you again for supporting us for the past 20 years, and we hope you'll continue to support us in the future!

- Eagle Publishing Family

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