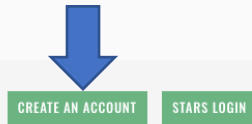


HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

1. The first step of the Invest Ed® STARS program is to have your waiver signed. If you are 18 you can sign the waiver. If you are 17 or under, a parent or guardian must sign the waiver. Return this waiver to your teacher.
2. Go to the [Investedok.org](https://investedok.org) website and click on STARS in the menu > Create an account

Invest Ed®

HOME INVESTING 101 DOCUMENTARIES SENIORS STARS EDUCATION MATERIALS OUTREACH CONTACT



STARS Program

What is STARS?

Invest Ed® STARS (Students Tracking and Researching the Stock Market) is a program of the Oklahoma Department of Securities that began in 2005 and, to date, has reached over 35,000 students. The STARS program is designed to enhance existing curriculum and promote the financial education of Oklahoma students.

The STARS program has been developed as an investor education and fraud awareness program. The STARS program teaches students to research investments, understand risk, and make informed decisions.



3. Then fill out the form that appears. It will look like this:

Ed x Invest Ed OK STARS Program x +

https://portfolio.investedok.org/register

STARS

Register

Name
Student Name

E-Mail Address
Students PERSONAL email, not their school

High School
Name of school

Grade
9th Grade

Password

Confirm Password

Class Code (Ask your teacher for this code!)

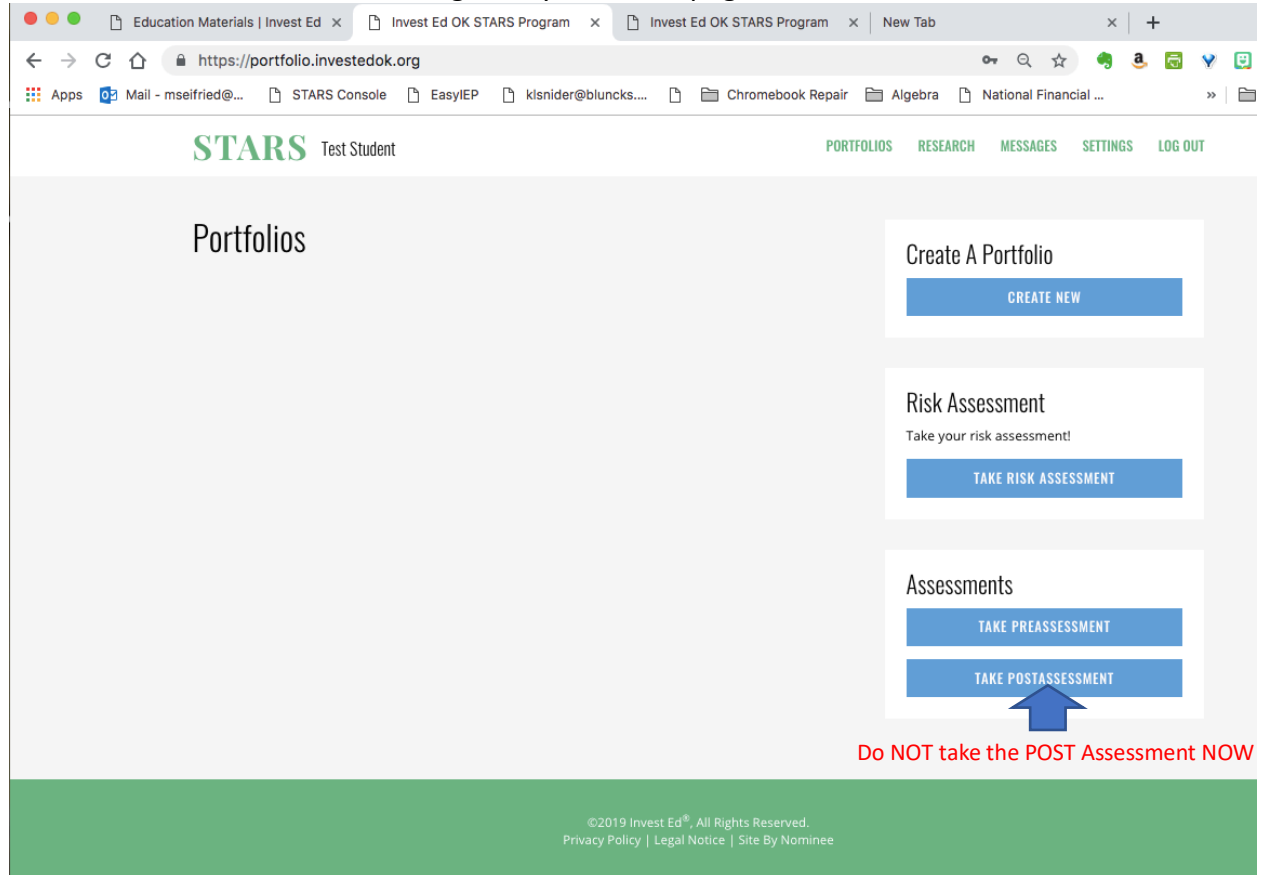
This is a code the teacher is given when a class is created

REGISTER

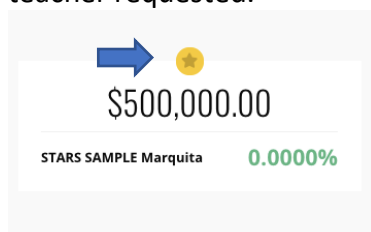
Fill out your name, personal email (so if you change schools you can take your account with you), name of high school, grade, set your password, confirm password by typing it in again, enter your Invest Ed® Teacher's class code. Type that code in the box very carefully and check it before hitting submit.

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

4. This is the home page you will see except your name will appear where you see “Test Student”. The first task your teacher will ask you will be to take a pre-assessment or take the risk assessment. Follow your teachers’ directions carefully. You can see that both of the blue buttons are right on your home page.



5. The next thing your teacher is likely to ask you to do is to create a portfolio. This part is very important. Get the following information from your teacher and write it here. What amount of money is in our portfolio? _____ \$500,000 is the default and if your teacher wants you to use a different amount you will enter it in the portfolio creation window. You can create as many portfolios as you want but only **ONE OFFICAL STARS PORTFOLIO**. Make sure you create it with the correct amount your teacher requested.



6. Your **STARS** portfolio will have a gold star on it and will be the only portfolio with **student tools**. To create a portfolio you will click the Create new under the Create a Portfolio button shown above. The first thing you will see is the following page. Let the

video load about ***Setting an Investment Goal***. The audio will only play if you click on the avatar. Watch at least once. Then you will create a portfolio.

PORTFOLIOS RESEA

Invest Ed®
Oklahoma Department of Securities
www.investedok.org

Create A Portfolio

Did you know you can create multiple portfolios including one that is used as a watchlist. You will need to name the portfolio that is the **STARS Portfolio** as: Fall or Spring--Year. If your teacher wants you to build a portfolio with a different amount of money you would choose that amount here. TIP: Recording research as you go is powerful for putting together your reports works sited page at the end of the project.

Portfolio Name

Starting Balance

\$ 500000

What is your **investment goal** for this portfolio?

To perform as good or better than the Dow for the same period. ▾

☐ This is my official STARS competition portfolio

CREATE PORTFOLIO

This is the video on How to set an investment goal based on your risk assessment.

Good info!

You can only check this STARS box 1 time. Make sure you have the correct starting balance if choosing as your STARS portfolio.

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

Create A Portfolio

Did you know you can create multiple portfolios including one that is used as a watchlist. You will need to name the portfolio that is the **STARS Portfolio** as: Fall or Spring--Year. If your teacher wants you to build a portfolio with a different amount of money you would choose that amount here. TIP: Recording research as you go is powerful for putting together your reports works sited page at the end of the project.

Portfolio Name

STARS Test User Spring 2019

Starting Balance

\$ 500000

What is your **investment goal** for this portfolio?

- ☒ To perform as good or better than the Dow for the same period.
- ☐ To perform as good or better than the S&P 500 for the same period.
- ☐ To watch and see how my stocks fluctuate over a length of time.
- ☐ To have an overall gain in my portfolio.
- ☐ Other

CREATE PORTFOLIO

Choose your investment goal for your portfolio. You can even choose other and type something different.

Next decide if this is your STARS PORTFOLIO, IF IT IS CHECK THE BOX! If it is not do **not** check the box. Hit the CREATE PORTFOLIO button and it will take you to the next screen on page 5.

Create A Portfolio

Did you know you can create multiple portfolios including one that is used as a watchlist. You will need to name the portfolio that is the **STARS Portfolio** as: Fall or Spring--Year. If your teacher wants you to build a portfolio with a different amount of money you would choose that amount here. TIP: Recording research as you go is powerful for putting together your reports works sited page at the end of the project.

Portfolio Name

STARS Test User Spring 2019

Starting Balance

\$ 500000

What is your **investment goal** for this portfolio?

To perform as good or better than the S&P 500 for the same peric ▼

☒ This is my official STARS competition portfolio

CREATE PORTFOLIO

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

STARS Test Student

PORTFOLIOSRESEARCHMESSAGESSETTINGSLOG OUT

Your new portfolio has been created!


STARS Test User Spring 2019

Portfolio Goal: To perform as good or better than the S&P 500 for the same period

| | | | |
|----------------|-------------|-----------------|-------------------|
| \$500,000.00 | \$0.00 | \$500,000.00 | 0% |
| Cash Available | Stock Value | Portfolio Value | Percentage Change |

| Name | \$ Current Price | % Daily Change | Shares Held | \$ Cost Basis | \$ Market Value | \$ Overall Change | % Overall Change | % Weight |
|--|------------------|----------------|-------------|---------------|-----------------|-------------------|------------------|----------|
| Please note that stock prices are on a one minute delay. | | | | | | | | |
| PLACE A TRADE | | | | | | | | |

Market Performance (Since portfolio creation)



Your Portfolio

| | | |
|---------------------------|--------------------------|--------------------------|
| 0.00% | 0.00% | 0.00% |
| Dow Jones | Nasdaq | S&P 500 |
| 25,985.16 -0.28% Today | 7,117.00 -0.08% Today | 2,792.38 -0.05% Today |

Student Tools

TRANSACTION HISTORY REPORTRESEARCH LOGDETAILED COMPANY INFORMATIONINSTRUCTIONS FOR REPORTMY STARS REPORT

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To place a trade you will hit the place a trade box and then go to page 6 these instructions to proceed.

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

STARS Test Student

PORTFOLIOS RESEARCH MESSAGES SETTINGS LOG OUT

Your new portfolio has been created!

STARS Test User Spring

Portfolio Goal: To perform as good or better than the market

\$500,000.00
Cash Available

0%
Percentage Change

NAME \$ Current Price % Daily Change

Please note that stock prices are on a one minute delay.

Market Performance (Since portfolio creation)

Place A Trade

TIP: For a \$500,000 portfolio it is sometimes helpful when buying stocks that are selling under \$100 that you think in terms of 1000 share buys instead of 100 share buys also called lots.

Buy **Sell**

Ticker: Quantity:

Why are you making this trade?

PURCHASE

Cancel Trade

PLACE A TRADE

You can see from the screenshot above the buy/sell window opens. Obviously, you choose the right tab for the transaction you wish to make. Next you will type the name/ or ticker symbol of the stock or investment you wish to buy. As you can see in the photo below a suggestion list of what you are typing starts to appear. You can directly choose one of those or just continue to type in your ticker.

Another thing you will note is once you enter the shares you can see what your price per share is, how much the trade will cost, and how much cash you will have left in the portfolio to spend. It will also ask you “Why are you making this trade?”

STARS Test Student

PORTFOLIOS RESEARCH MESSAGES SETTINGS LOG OUT

Your new portfolio has been created!

STARS Test User Spring

Portfolio Goal: To perform as good or better than the market

\$500,000.00
Cash Available

0%
Percentage Change

NAME \$ Current Price % Daily Change

Please note that stock prices are on a one minute delay.

Market Performance (Since portfolio creation)

Place A Trade

TIP: For a \$500,000 portfolio it is sometimes helpful when buying stocks that are selling under \$100 that you think in terms of 1000 share buys instead of 100 share buys also called lots.

Buy **Sell**

Ticker: **RPM** Quantity:

RPM International Inc. (RPM)
T. Rowe Price Mid-Cap Growth (RPMGX)
Rego Payment Architectures Inc. (RPMT)
Royce Pennsylvania Mutual Instl (RPMIX)
Reinhart Mid Cap PMV Inv (RPMXX)

Why are you making this trade?

| | |
|----------------|--------------|
| RPM | \$58,7800 |
| Shares | 1000 |
| Purchase Price | \$58,780.00 |
| Cash Remaining | \$441,220.00 |

PURCHASE

PLACE A TRADE

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

Place A Trade

TIP: For a \$500,000 portfolio it is sometimes helpful when buying stocks that are selling under \$100 that you think in terms of 1000 share buys instead of 100 share buys also called lots.

Buy

Sell

Ticker

Quantity

RPM

1000

Why are you making this trade?

Great dividend record.

| | |
|----------------|--------------|
| RPM | \$58.7800 |
| Shares | 1000 |
| Purchase Price | \$58,780.00 |
| Cash Remaining | \$441,220.00 |

PURCHASE

Cancel Trade

Once you are happy with your trade, hit the PURCHASE button and you will see the screen below.

STARS Test Student

[PORTFOLIOS](#) [RESEARCH](#) [MESSAGES](#) [SETTINGS](#) [LOG OUT](#)

Your purchase is successful!

STARS Test User Spring 2019 [🔗](#)

Portfolio Goal: To perform as good or better than the S&P 500 for the same period

\$441,220.00

Cash Available

\$58,790.00

Stock Value

\$500,010.00

Portfolio Value

0.0020%

Percentage Change

| Name | \$ Current Price | % Daily Change | Shares Held | \$ Cost Basis | \$ Market Value | \$ Overall Change | % Overall Change | % Weight |
|------|------------------|----------------|-------------|---------------|-----------------|-------------------|------------------|----------|
| RPM | 58.7900 | 0.4271% | 1000 | 58.78 | 58,790.00 | 0.01 | 0.02% | 11.76% |

Please note that stock prices are on a one minute delay.

PLACE A TRADE

To make another trade just hit the PLACE A TRADE button. Most likely you are going to need to do some research first so let's see where you record the results of your stock research. You have a RESEARCH LOG for recording information in articles you read but you also have a DETAILED COMPANY INFORMATION

Student Tools

[TRANSACTION HISTORY REPORT](#)

[RESEARCH LOG](#)

[DETAILED COMPANY INFORMATION](#)

[INSTRUCTIONS FOR REPORT](#)

[MY STARS REPORT](#)

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Research Log

The more detail entered in this screen now the less information you will have to go back and find later. A works cited page may be able to generate from the data you enter now.

Source (Website or Publication)

Author/Editor

Company Name (If Applicable)

Ticker (If Applicable)

Title of Article

Date of Article

Comments

Tags (separate each tag by a comma)

SUBMIT RESEARCH

BACK TO PORTFOLIO

Enter the information completely and your works cited page will be a breeze. I entered some information and hit the SUBMIT RESEARCH button and it looks like the screen shot on page 9.

Research Log

The more detail entered in this screen now the less information you will have to go back and find later. A works cited page may be able to generate from the data you enter now.

Source (Website or Publication)

Author/Editor

Company Name (If Applicable)

Ticker (If Applicable)

Title of Article


Date of Article

Comments

Tags (separate each tag by a comma)

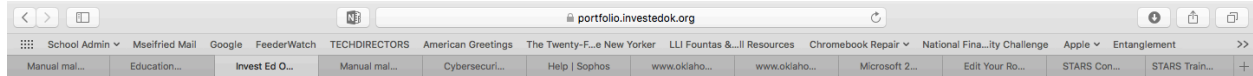
SUBMIT RESEARCH

Submitted Research

| Date of Research | Source (Website or Publication) | Author/Editor | Company | Ticker | Title of Article | Date of Article | Comments | |
|------------------|---------------------------------|---------------|---------|--------|------------------------|-------------------|--|---|
| Feb 27th, 2019 | betterinvesting.org | Ken Kulava | Total | TOT | Companies Worth a Look | February 27, 2019 | TOT is a cyclical foreign diversified energy company that has the best 3-5 year prospects when compared to other companies in the same industry. |  |

BACK TO PORTFOLIO

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT



STARS Test Student

[PORTFOLIOS](#) [RESEARCH](#) [MESSAGES](#) [SETTINGS](#) [LOG OUT](#)

Detailed Company Information

The STARS report asks you to write in detail about one company, but to do proper research on your companies you should ask many of the questions asked on this screen to determine if a company is a good fit for your portfolio based on your investment goal. Therefore, you could have detailed information on all your companies.

Basic Information

| | | | |
|----------------------|----------------------|---|------------------------------|
| Company | Ticker Symbol | | |
| <input type="text"/> | <input type="text"/> | | |
| Industry | Sector | Products/Services | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| PE Ratio | Earnings Per Share | Market Cap | % Sales Growth for Next Year |
| <input type="text"/> | <input type="text"/> | <input type="text" value="Large Cap"/> | <input type="text"/> |
| Company Headquarters | Year Company Founded | Company Website / Investor Relations Page | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Description | | | |
| <input type="text"/> | | | |

News/Current Events

Find article/information related to some of the interesting data points you found, and/or recent, relevant events that may affect your portfolio. Document key points of articles.

| |
|----------------------|
| Source |
| <input type="text"/> |
| Key Points |
| <input type="text"/> |

Information from Company Sources

If possible, contact an employee of the company. Ask questions relevant to the company's stock, the stock market, and/or your portfolio.

| |
|----------------------|
| Source/Employee |
| <input type="text"/> |
| Question |
| <input type="text"/> |
| Answer |
| <input type="text"/> |
| Question |
| <input type="text"/> |
| Answer |
| <input type="text"/> |
| Question |
| <input type="text"/> |
| Answer |
| <input type="text"/> |

[SUBMIT COMPANY INFORMATION](#)

[BACK TO PORTFOLIO](#)

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

The detailed company page is for entering a lot of information about one company. When you hit the back to portfolio button you will see other buttons at the bottom of the page but they are for when you are ready to work on your STARS report.

Let's take a look at the other menu items at the top of the home page. The view below is your home page. If you see the green links on the right you will see a PORTFOLIO, RESEARCH, MESSAGES, SETTINGS AND A LOG OUT link. We will check out each one.

Below you can also see that I created another portfolio.

Education Materials | Invest Ed | Invest Ed OK STARS Program | Invest Ed OK STARS Program | New Tab

https://portfolio.investedok.org

Apps | Mail - mselfried@... | STARS Console | EasyIEP | klsnider@bluncks... | Chromebook Repair | Algebra | National Financial ... | Teambuilders

STARS Test Student

PORTFOLIOS RESEARCH MESSAGES SETTINGS LOG OUT

Portfolios

\$500,092.50

STARS Test User Spring 2019 0.0185%

\$500,000.00

Watchlist TU 0%

This icon designates your official STARS portfolio.

Create A Portfolio

CREATE NEW

Risk Assessment

Take your risk assessment!

TAKE RISK ASSESSMENT

Assessments

TAKE PREASSESSMENT

TAKE POSTASSESSMENT

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STARS Test Student

PORTFOLIOS RESEARCH MESSAGES SETTINGS LOG OUT

Research Log

This screen holds a cumulative view of all the research you have compiled. TIP: This list is only as complete as the data you enter so remember when making an entry to be comprehensive. There is nothing frustrating than trying to go back and find a specific article after weeks have passed.

Submitted Research

| Date of Research | Source (Website or Publication) | Author/Editor | Title of Article | Date of Article | Comments |
|------------------|---------------------------------|---------------|------------------------|-------------------|--|
| Feb 27th, 2019 | betterinvesting.org | Ken Kulava | Companies Worth a Look | February 27, 2019 | TOT is a cyclical foreign diversified energy company that has the best 3-5 year prospects when compared to other companies in the same industry. |

The PORTFOLIO page is pictured on page 6 of this document so I am not going to put it in again. Let's go to the research tab, it opens the research log.



HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

The next tab is the MESSAGES tab which let you and your teacher communicate with each other about your project.

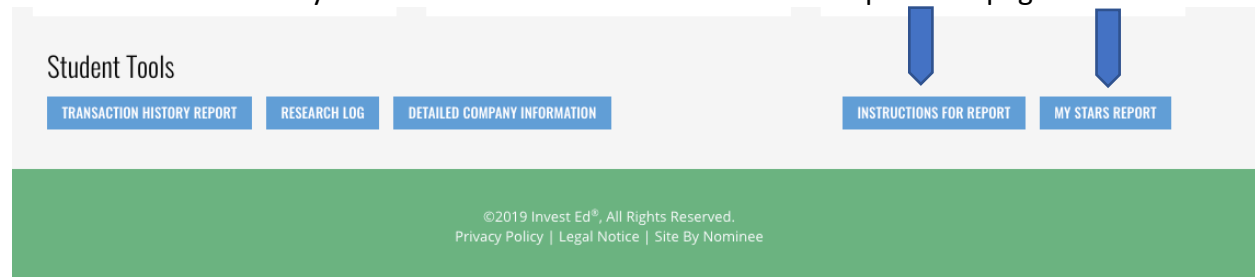
The screenshot shows the 'STARS Test Student' interface. At the top, there are navigation links: PORTFOLIOS, RESEARCH, MESSAGES, SETTINGS, and LOG OUT. The main heading is 'Messages'. Below it, a green notification bar says 'Your message has been sent!'. On the left, there is a text input field and a blue 'POST MESSAGE' button. On the right, a green message bubble says 'I have my STARS portfolio made.' with a timestamp 'You ~ 6 seconds ago'.

The SETTINGS link brings up the following screen. From here you can update all the information you see. Including your teacher's class code and change your password. The next link is the LOG OUT button.

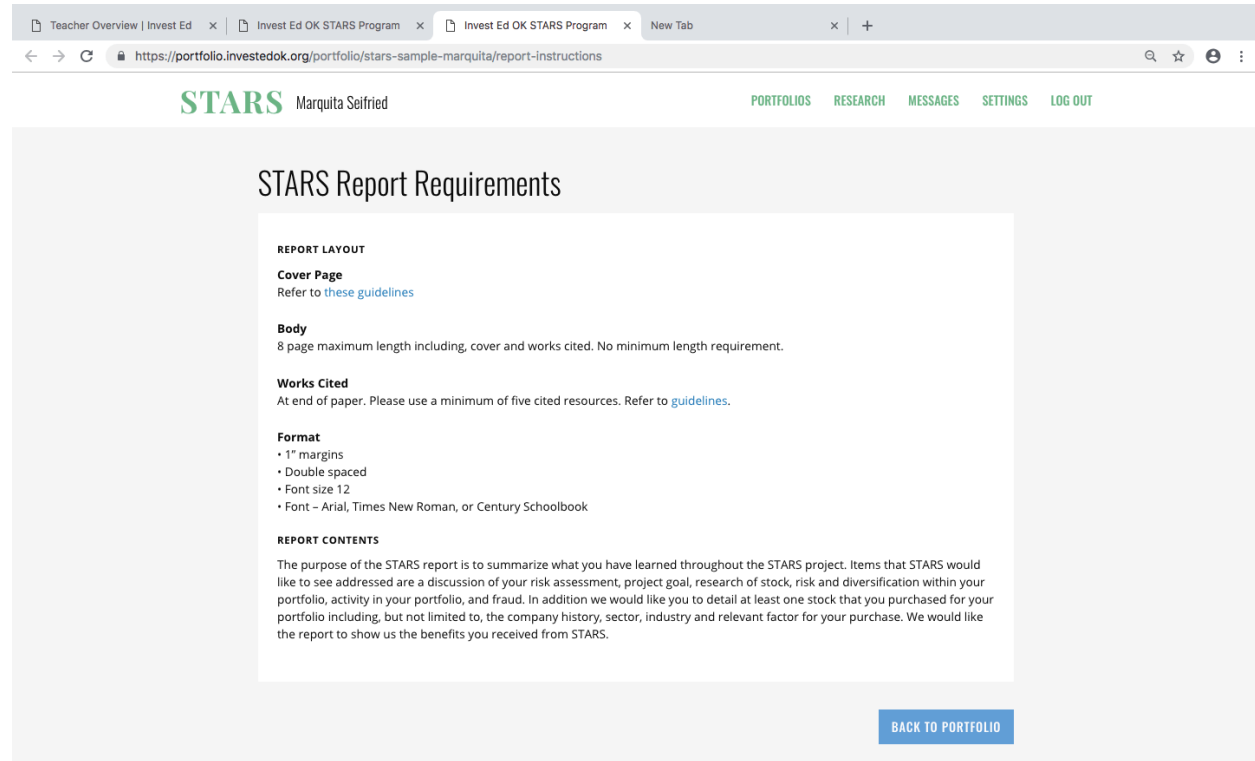
The screenshot shows a web browser window with the URL 'https://portfolio.investedok.org/settings'. The page is titled 'Settings' and contains three main sections: 'Update Information', 'Update Password', and 'Class'.
1. 'Update Information' section: Includes fields for Name (Test Student), Email Address (999999@seiling.k12.ok.us), High School (Seiling), and Grade (9th Grade). There is an 'UPDATE' button at the bottom.
2. 'Update Password' section: Includes fields for New Password and Confirm New Password. There is an 'UPDATE' button at the bottom.
3. 'Class' section: Includes a message 'Your current teacher is Marquita K Seifried in Training Class. If this is incorrect, please enter a new code below.' and a field for 'Enter Class Code (ask your teacher for this code)'. There is an 'UPDATE' button at the bottom.

HOW TO SET UP YOUR INVEST ED STUDENT ACCOUNT

The last items to show you are the last two buttons on the STARS portfolio page.



The INSTRUCTIONS FOR REPORT link:



And last but not least the MY STARS REPORT link: Here is where you will upload your report as a PDF file.

