



Big News

Changes, Updates and Additions

Agenda



- Updates/changes to services
- Additions (free) for Traders Reserve community
- Reminder: Discord TR Nation
- Millionaire's Trading Club October Event + Reminders
- Investor's Blueprint Live 2025

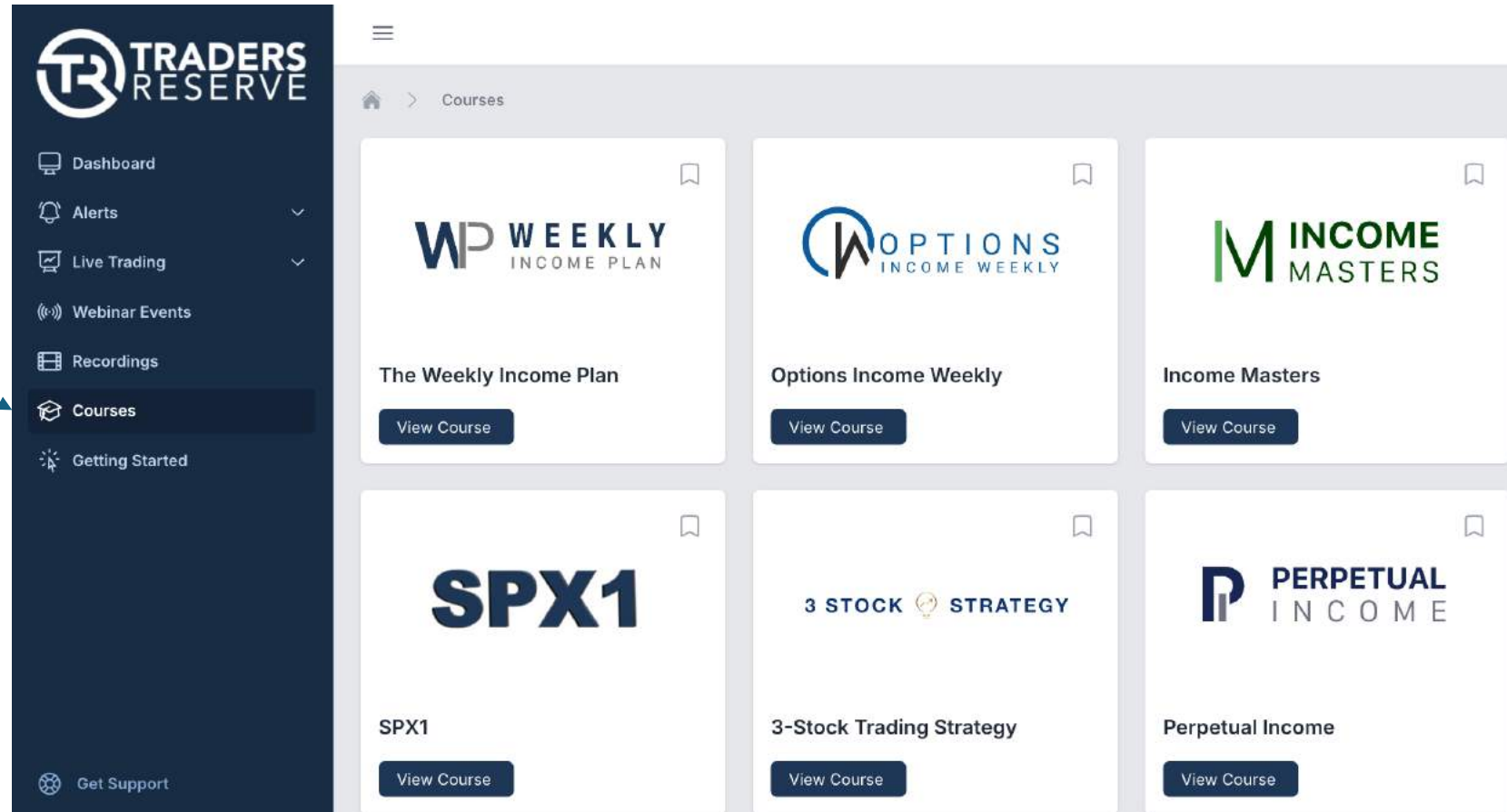
Thank you



- Last 12 months challenging to rebuild, consolidate and restructure (tech)
- Changes designed to simplify for everyone
- Good news: We're almost done
- Expansion of expert(s) in 2025

Reminder: Courses Included with Services

- Click Courses in left-hand menu
- Click **View Course**
- Watch training videos, download slides
- Some services will continue to receive new material in the months ahead





TR Nation on Discord

- Unofficial Traders Reserve Discord channel
- Managed by Earl, a long-time member of our services
- Over 70 members of Traders Reserve services contributing (or lurking)
- Ideas, help, questions, community
- We do not manage, but we do occasionally contribute
- <https://discord.gg/kt3ZCnKx>

Events: Updates, Announcements

Announcing Investor's Blueprint 2025 and an update to Millionaire's Trading Club October event

Investor's Blueprint Live 2025



- Hyatt Place - Boca Raton, Florida
- **“Pencil”** Dates: February 24-26 (Monday-Wednesday)
- Pre-conference trading / training sessions:
 - November
 - December
 - January
- (Pre-sale) Tickets Available in August

Investor's Blueprint Live: Red Carpet VIPs

IBL 2025 Comp Members:
Includes ticket + guest/spouse

Susan Korbach
Tom Schleper
Margaret Dwyer
Don Lewis
Jack Gaithings
Terry Brace
Anita Holec
Van Nguyen
Leona Skerret
Brad Loewen

IBL Legacy Members:
Includes ticket + hotel

Linda Wiekhorst
Jon Russell
Brad Wallin
Dan Sweeney
Nick Cognevich
ElizabethClare Hunt
Dan Spedale
Jack Wood

Limousine not included.

Reminder for Millionaire's Trading Club

- First of 3 pre-conference trading session is Wednesday, July 17
- Trading hours: 10am to Noon Eastern Time
- Live trading held on the Traders Reserve Live Website in the Millionaire's Trading Club room.
- “suenphx” is lonely – get in there and introduce yourselves in the chat box before July 17.
- Additional trading sessions: August 14 and September 18
- Main Conference: October 16-18



Millionaire's Trading Club: Announcement

- Haley Bjorklund will present during the October Millionaire's Trading Club event
- Available for Office Hours for Las Vegas attendees (not virtual)
- Hyatt Place – Silverton Village
Las Vegas, October 16-18, 2024
- Discounted tickets still available
 - Live attendance in Las Vegas
 - Virtual attendance





Coming Soon

New additions. No Cost.

Coming
August 5, 2024





The iQ – the more you know, the more you make

- Monday at 4pm on the Traders Reserve Live site
 - Webinar Events Room
 - Free to attend – not a paid service
- Register once and receive weekly email reminder, replays and special email updates
- Where to make money this week
 - Four Things Moving Markets
 - Research: Stocks and ETFs for trading or investing
 - Performance updates from our services (last week)
- 30-minutes | post-market



Traders Reserve Training Classes

- Rollout in Fall 2024
- 30-minute training classes
- Training classes will not include trading
- Basic to Advanced classes for:
 - Stock investing
 - Options trading
 - Portfolio management
- Will hold classes on a schedule
- Free to attend

Pop Quiz: Identify This Chart



VIX

VIX

Jun 25 O:14.50 H:14.85 L:14.20 C:14.35 Vol:82.50K

2020-2021: Remember
how easy it was to
generate income?

2016-17:
Premiums hard
to come by,
increasing stock
risk

2023-24:
Premiums hard
to come by,
increasing stock
risk





Additions and Changes to Services

Additions

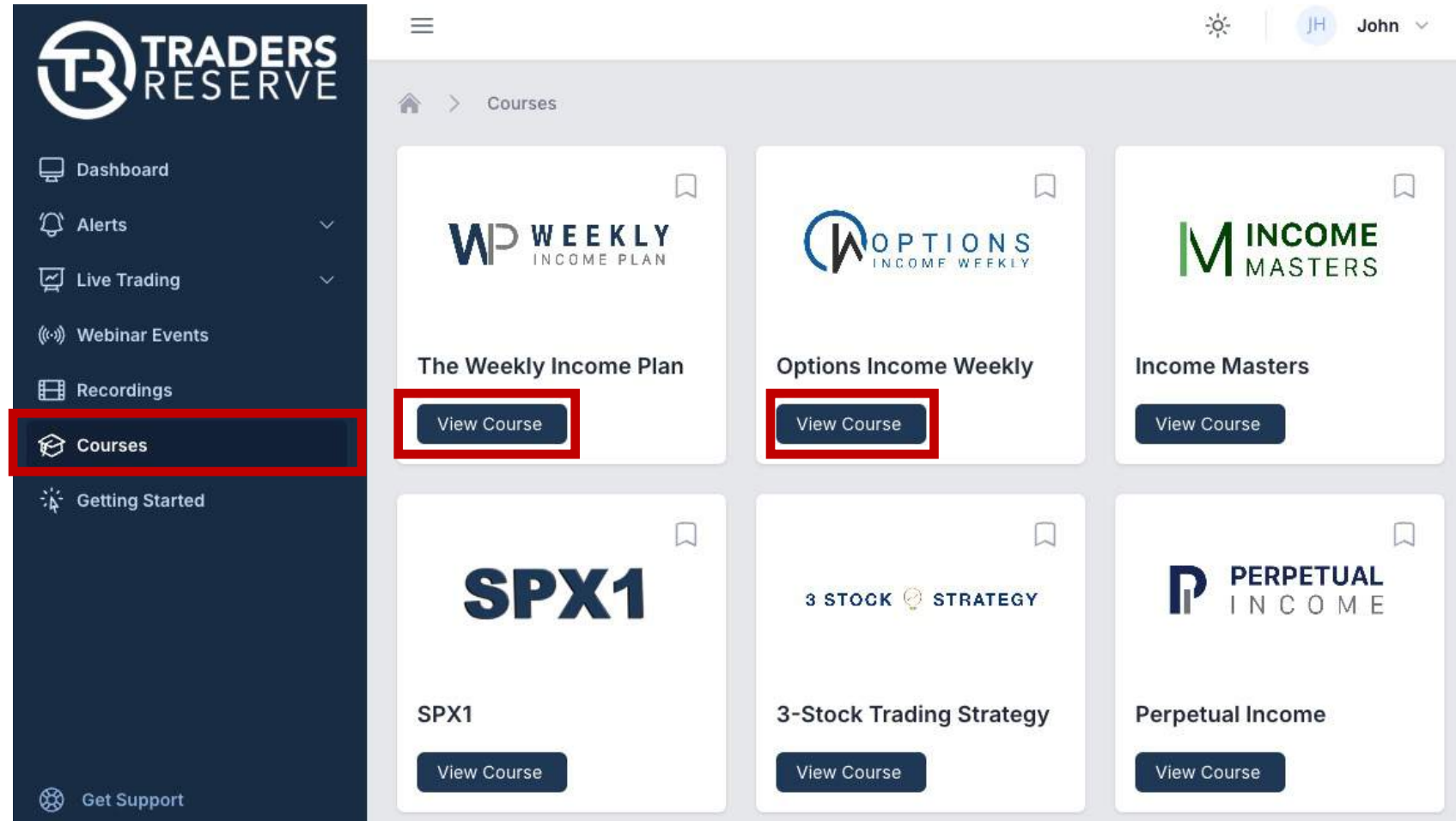
- Adding recovery tactics and tactics to avoid assignment beginning in July
- This will mean trading simple spread options as defensive tactics.
- New **Weekly Income Plan** training program access added to Options Income Weekly subscriptions (Access available NOW)



Included with Options Income Weekly

Under “Courses” menu on the Traders Reserve Live website are two separate courses for Options Income Weekly members:

- Weekly Income Plan (new) – **available now**
- Options Income Weekly





The Weekly Income Plan

15 Lessons 1h 8m 44s

Section 1 | Introduction

01 Evolution of the Weekly Income Plan

Lesson 1 6m 58s

02 What Is The Weekly Income Plan

Lesson 2 1m 56s

03 Trading Options for Income

Lesson 3 5m 5s

04 The 4 Best Strategies for Selling Options

Lesson 4 4m 13s

WEEKLY

INCOME PLAN

Section 2 | How To Sell Options For Income

05 Selling Option Basics

Lesson 5 5m 16s

06 4 Keys to Finding Stocks and ETFs to Trade

Lesson 6 7m 5s

07 5-Point Checklist to Picking the Best Option Strike

Lesson 7 7m 58s

08 Let's Sell a Put Option Together

Lesson 8 6m 20s

09 Manage Your Sold Put Position

Lesson 9 10m 19s

Section 3 | Your Action Plan

10 Put The Weekly Income Plan To Work For You

Lesson 10 9m 30s

11 Scaling the Weekly Income Plan

Lesson 11 4m 4s

Section 4 | Cheatsheets

12 Put Calculator

Lesson 12

13 Vocab Sheet

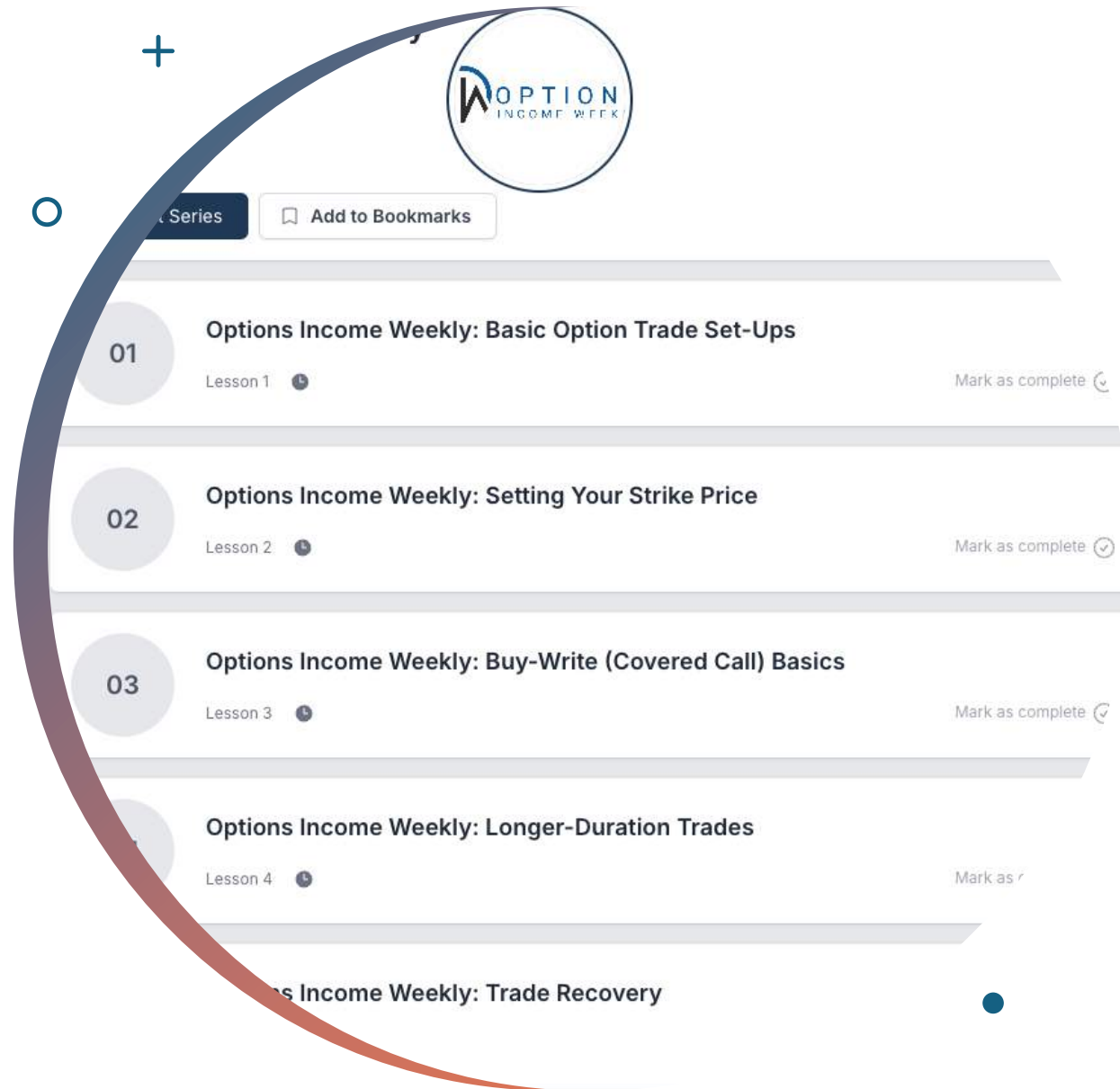
Lesson 13

14 Roll & Recover Cheatsheet

Lesson 14

15 Enter Your Trade Cheatsheet

Lesson 15



Options Income Weekly Training

- 5 Training Modules
- Covers Selling Puts and Calls
- Advantages of longer-duration trades (in low VIX market)
- Recovery tactics
- More training videos will be added in 2024



Income Masters Changes

Don't panic. Hands off keyboards. 😊

Income Madness

- Exclusive to Income Masters
- No longer sold separately
- Flexibility
 - Scheduling (vs 6-8 weeks out)
 - Time / Length (2-day, 3-day, 5-day events)
 - Position management
- Access for non-Income Masters members via Explorer Pass
 - 30-days access to all of Income Masters, not solely Madness

INCOME
MADNESS



Perpetual Income Moves to Income Masters

YEAR	RETURN
2020	30.1%
2021	28.1%
2022	19.7%
2023	20.2%

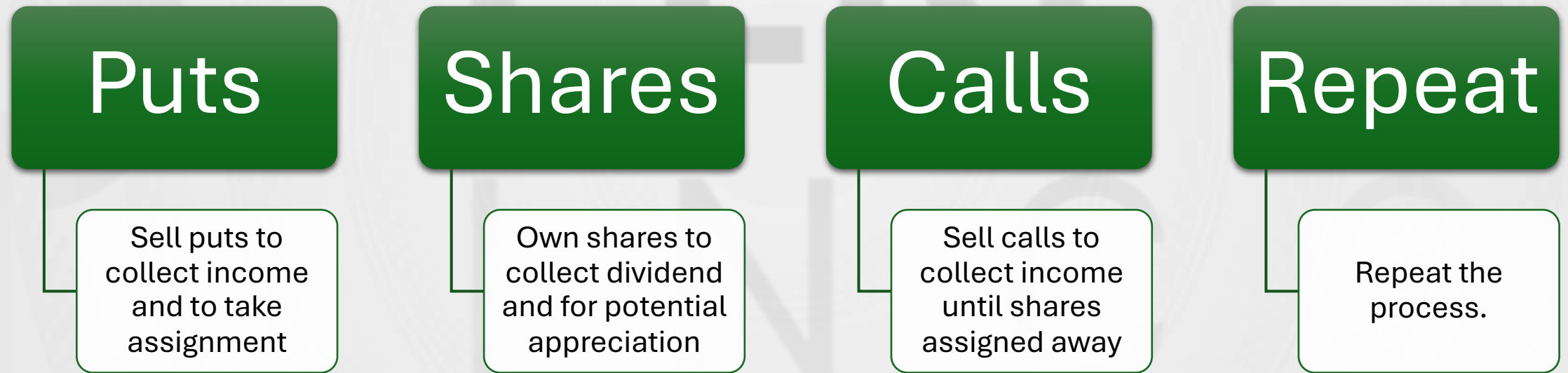
- Effective July 8: Perpetual Income will be exclusive to Income Masters
- Will not be available as a separate service
- 4-year track record averaging 24.5% annual return on capital
- Provides a strong floor for income for Masters members
- Provides a defense against volatile markets
- Provides flexibility in stocks to trade and methodology

Advantages

- More choices for trades and tactics in low VIX environment
- More choices for method of income (premium, dividends, appreciation)
- More choices of stocks
- Less worry about assignment values for specific stocks we want to own
- Sell both calls and puts on same stocks
- Larger portfolios gain more choices for positions



Perpetual Income: Process to capture income 3 ways from a single stock.



Perpetual Income: 2024 YTD Capital Return

Capital amounts represent one (1) contract per stock position

Portfolio	Capital In	Income	Return
Active Income	\$33,900	\$4,459	13.2%
Opportunity	\$28,996	\$3,508	12.1%
Cash Raid	\$26,750	\$3,541	13.2%
	\$89,646	\$11,508	12.8%

Active Income contains 4 stocks regularly traded for cash income from puts or calls; and collecting dividends.

Opportunity contains stocks traded from time to time, consistent with weekly Income Masters trading and will not specifically seek dividend returns.

Cash Raid is a special tactic used on stocks which have monthly options to capture both premium and dividends.

Returns updated through June 28 for actively traded positions.

Active Income Portfolio

- Currently holds 4 stocks
- Stocks will likely change following transition
- Objective is an actively traded group of 4-6 stocks
- Income from options, dividends and potential appreciation
- This approach will be the primary Perpetual Income portfolio inside Income Masters

Stock	Symbol	Income	Return
Blackstone	BX	\$2,029	17.1%
Camping World	CWH	\$447	15.4%
Cardinal Health	CAH	\$985	12.2%
CF Industries	CF	\$998	9.1%

Stock	Symbol
Network Appliance	NTAP
Southern Co.	SO
DOW Inc.	DOW
BP	BP
Philip Morris	PM
Williams Cos.	WMB
Gilead Sciences	GILD

Opportunity Portfolio

- Group of stocks traded when premium or dividend justifies a trade
- Some stocks traded more actively than others
- Longer-dated trades (30-45 days)
- Unlike Active Income Portfolio, objective is **not** long-term or full-year exposure
- Stocks added to Income Masters or Perpetual Income rotation/portfolios

Cash Raid Portfolio

- Different combination of options tactics
- Used exclusively for stocks with monthly options
- Puts and Put spreads in combination with buy/write

Stock	Symbol	Income	Return
AbbVie	ABBV	\$1,543	9.4%
Crown Castle	CCI	\$666	6.1%
Iron Mountain	IRM	\$509	6.4%
ONEOK	OKE	\$823	10.6%



Perpetual Income
from Dividend Stocks



Active Trading for
Weekly Income



Accelerated Income
Income Madness

Income Masters: 3 Income Approaches

Income Masters Overview

Capital levels are estimates based on one contract per trade or position.

PERPETUAL INCOME

- 4-6 Stocks / Portfolio-basis
- Sell puts **and** calls weekly
- Collect dividends
- Potential appreciation
- Capital: \$30,000 to \$50,000

Goal: 20-28% Annual Return

INCOME MASTERS

- 3-5 trades per week
- Single-sided puts/calls
- Spreads: stocks above \$100
- Two trading sessions / week
- Capital: \$100,000+

Goal: 30-40% Annual Return

INCOME MADNESS

- Held 6x per year
- 5 days of live trading
- 2-3 trades per session
- Puts, Calls and Basic Spreads
- Capital: \$50,000 per event

Goal: \$3,000 income per event



Income Masters

8 Lessons

Section 1 | Tools and Resources

Section 2 | Training Sessions

01 Income Masters: Basics of Credit Spreads

Lesson 1

02 Income Masters: Basics of Credit Spreads — Part 2

Lesson 2

03 Income Masters: Option Assignment and Early Assignment

Lesson 3

04 Income Masters: Trade Recovery

Lesson 4

05 Income Masters: Jade Lizards Training

Lesson 5

06 Income Masters: Thinkorswim Basics

Lesson 6

Training Courses for Income Masters

- Access to Perpetual Income training to learn the process
- Masters includes 8 lessons already completed
- Will incorporate an Income Madness training video for new members.
- Additional training videos and material to be added in 2024



Perpetual Income

4 Lessons

01 Perpetual Income: The A Income Process

Lesson 1

02 Perpetual Income: Finding Dividend Stocks

Lesson 2

03 Perpetual Income: Income and Capital Allocation Spreadsheet

Lesson 3

04 Perpetual Income: 2024 Session

Lesson 4

Transition Notes

- The Income Madness room will be removed once the current Madness event positions are completed.
- The Perpetual Income room will be removed once we move all non-Income Masters into Income Masters.
- We will maintain trade alert categories for Income Masters, Income Madness and Perpetual Income so members can distinguish between trade alerts and choose the alerts/trades which best fit their goals.

Emily Norris

Costco (COST): \$849.51

Sell to open **COST 19 Jul 815 Put**

Buy to open **COST 19 Jul 810 Put**

For a net credit of around \$0.67 each

Set a GTC order to exit at \$0.10 each

We are selling five contracts of this bull put spread in the live account.

Open

Income Madness

Emily Norris

Netflix (NFLX): \$677.13

Buy to close **NFLX 5 Jul 615 Put**

Sell to close **NFLX 5 Jul 610 Put**

For a net debit of around \$0.20 each

Profit: \$0.60, or \$60 per spread (\$240 for five contracts)

Close

Income Masters

Emily Norris

Blackstone (BX):124.41

Buy to close BX 28 Jun 125 call

Sell to open BX 12 Jul 125 call

For a credit of around 1.60 to 1.65

Roll

Perpetual Income



Transition Timeline

- Income Madness becomes exclusive at close of current Madness event.
- Perpetual Income: Begins July 8
 - Perpetual Income members who are not Masters members will be transitioned into Masters.
 - We will 'reset' the Perpetual Income portfolio in July/August period.
 - We expect everyone to be on same position schedule no later than Labor Day weekend.



Transition of Memberships

- Income Masters **Unlimited** members: Perpetual Income included at no cost to you.
- Income Masters **Access Pass** members: Perpetual Income included at no additional cost to you.
- Income Masters **with** Perpetual Income: Perpetual Income subscription ended and included with Masters.
- Perpetual Income **without** Income Masters: Transitioned to Income Masters with subscription value applied.
- We will address all subscription issues over the next 60 days.

Income Masters Access Pass Choices

- \$2,995 Annual VIP Membership | \$3,995 (2025)
- \$795 3-Month Pro Pass Membership | \$995 (2025)
- \$297 30-Day Explorer Pass Membership | \$349 (2025)



Correcting a Disparity | Masters Unlimited



Income Masters Unlimited members have significant long-term cost advantage.



We will re-open Income Masters Unlimited beginning today through Labor Day.



Unlimited Pass is a one-time charge; you remain a member for as long as you wish.



Unlimited means no recurring or renewal charges; no membership or maintenance fees.



Unlimited will **not** be offered again for Income Masters.



Options Selling Services

Options Income Weekly

- 95% Puts
- 5% Calls (recovery)
- Basic Put Spreads for special situations
- Stocks priced between \$20 and \$100
- 50-100 trades per year
- **Portfolio \$25,000-\$100,000**
- **Annual Return Goal:** 12% to 18%

Income Masters

- 60% Puts individual trades
- Puts and Calls for Perpetual Income stocks
- Put Spreads on stocks above \$150/share
- 300-350 trades per year
- **Portfolio \$100,000 to \$2 Million**
- **Annual Return Goal:** 30% to 40%

5k Challenge

- 100% Spread tactics
- Debit and Credit spreads
- Index, Index ETF, Sector ETF, some individual stocks
- 200-250 trades per year
- **Dedicated Trading Capital** \$50,000 to \$150,000
- **Annual Return Goal:** 50% to 100%

SPX1 service is not listed for brevity.

THANK YOU

THANK YOU