A COMPANION WORKBOOK

Based on "Invest Like Buffett: Value Investing for Parents"

The 'Invest Like Buffett' Companion Workbook

Your Action Plan for Parent-Powered Value Investing

"Build generational wealth, one smart investment at a time"

By Pauline Teo

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Welcome

Your Transformation

You move from market anxiety to confident investing, securing your family's future with Warren Buffett's proven strategies.

Who This Workbook Is For

For working parents (age 28-45) eager to secure their children's education and their own retirement. If you value proven strategies, need clear, actionable steps, and are motivated to build wealth without becoming a trading expert, this workbook is your indispensable guide. Transform market anxiety into confident, disciplined action.

How To Use This Workbook

Work through one section at a time. Read the prompts, then write your responses on the ruled lines provided. There are no wrong answers — the goal is reflection and action. Set aside 20–30 minutes for each section.

Contents

1. Your Family's Financial North Star
2. Demystifying Stock Investing: No Jargon Allowed
3. Buffett's 3R Concept in Action
4. The Parent-Investor's Stock Selection Playbook
5. Taking Action: Your First Confident Steps

SECTION 1

Your Family's Financial North Star

This section frames your investing journey within your family's unique financial goals. Before you invest a single dollar, define what financial security and prosperity mean for your children and your retirement, grounding your strategy in purpose.

Exercises

1. My Family's Financial Future Vision

2. Cost of Dreams: Education & Retirement Projections

3. Why I Invest: My Personal Financial Mission Statement

After this section, you can:
articulating clear personal and family financial goals

SECTION 2

Demystifying Stock Investing: No Jargon Allowed

Cut through the noise and confusion often associated with the stock market. Learn the fundamental truths about what stock investing is and, crucially, what it's not, setting a realistic and empowering foundation for your investment journey.

Exercises

1. Stock Investing: Myth vs. Reality Check

2. Identifying My Circle of Competence for Investing

3. Understanding Stock Ownership: Beyond the Price

After this section, you can:
gaining foundational clarity on stock market mechanics

SECTION 3

Buffett's 3R Concept in Action

Dive deep into the heart of Warren Buffett's investment philosophy: the 3R Concept (Right Business, Right Management, Right Price). This section provides practical tools to evaluate companies like a seasoned investor, focusing on long-term value.

Exercises

1. Analyzing a 'Right Business' with the Parent-Friendly Value Stock Checklist

2. Evaluating 'Right Management' for Durable Companies

3. Estimating 'Right Price' for Margin of Safety

After this section, you can:
applying Buffett's 3R framework to real-world companies

SECTION 4

The Parent-Investor's Stock Selection Playbook

Move from theory to practical application with step-by-step guides and checklists designed for busy parents. This section helps you identify high-quality businesses that fit your family's values and financial goals, just like Buffett does.

Exercises

1. Building My Family's Watchlist of Durable Brands

2. Filtering Prospects: Circle of Competence for Families

3. Before You Invest: The Final Due Diligence Checklist

After this section, you can:
developing a systematic approach to stock selection

SECTION 5

Taking Action: Your First Confident Steps

Equip yourself with the knowledge and confidence to make your first informed investment decisions. This section focuses on getting started, managing your portfolio as a parent, and committing to your long-term wealth-building journey.

Exercises

1. Setting Up My Investment Account Action Plan

2. My Investment Portfolio Tracking Sheet

3. Long-Term Investor Mindset: Sustaining Success

After this section, you can:
executing initial investment decisions and maintaining discipline

Your Toolkit

These templates are yours to keep. Each one corresponds to a section in this workbook — fill them in by hand or on screen, then revisit them whenever you need to reset.

- **My Family's Financial Future Vision**

Define and align your family's core financial aspirations and long-term security goals.

- **Parent-Friendly Value Stock Checklist**

Evaluate potential investments using Pauline's simplified criteria, ensuring quality and alignment with your 'Circle of Competence'.

- **Margin of Safety Simplified Calculator**

Determine a safe entry price for stocks, minimizing risk and maximizing potential returns.

- **My Investment Portfolio Tracker**

Monitor your investments' performance and stay organized with your family's growing portfolio.

TOOLKIT

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Track	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Metric 1: _____							
Metric 2: _____							
Metric 3: _____							
Metric 4: _____							
Reflection / win							

Your Action Plan

What You'll Walk Away With

- My Family's Financial Future Vision
- Parent-Friendly Value Stock Checklist
- Margin of Safety Simplified Calculator
- My Investment Portfolio Tracker

30-Day Commitment Grid

Tick a box for each day you take action on what you learned.

Day 1	**Day 2**	**Day 3**	**Day 4**	**Day 5**
Day 6	**Day 7**	**Day 8**	**Day 9**	**Day 10**
Day 11	**Day 12**	**Day 13**	**Day 14**	**Day 15**
Day 16	**Day 17**	**Day 18**	**Day 19**	**Day 20**
Day 21	**Day 22**	**Day 23**	**Day 24**	**Day 25**
Day 26	**Day 27**	**Day 28**	**Day 29**	**Day 30**

Thank you for completing this workbook.

If this workbook helped you, the next step is to read or revisit "Invest Like Buffett: Value Investing for Parents" — that's where the full framework lives. Share your wins with Pauline Teo on social — your story may inspire the next reader.