

Level 3

Overview - Portfolio Building and Stewardship

Topic 3.1: Investing with an Abundance Mindset

Explores how your financial goals connect with caring for family and community, supporting useful work like dependable energy, nutritious food, and healthcare while balancing meaningful purpose with sustainable project growth.

Topic 3.2: Where to Start Your Research

Demonstrates how to take an interesting idea and evaluate the underlying project by asking what it does, who benefits, and how it will grow, building your understanding step-by-step through verified information.

Topic 3.3: Building a Diversified Portfolio

Shows how every piece of your portfolio plays a unique role, allowing you to align your financial journey with your true purpose by connecting resources to community development, emerging technology, or humanitarian work.

Topic 3.4: Investing in Quantum Technology

Introduces computing, sensing, and communication advancements across healthcare, farming, and transportation, encouraging thoughtful research into what is demonstrated versus what remains in development.



Topic 3.5: Sectors and Subsectors

Maps out how broader economic areas and specific fields interconnect—such as how a new vehicle ties together manufacturing, materials, software, and energy—opening up fresh directions for research based on your curiosity.

Topic 3.6: Across the World, Investing in the Golden Age

Widens the lens to global regions, exploring how local resources, agriculture, minerals, and advanced industries support livelihoods, infrastructure, and community opportunities worldwide for a more abundant future.

Topic 3.7: Teaching the Next Generation

Guides parents, grandparents, and caregivers in planting seeds of understanding through co-learning, practice portfolios, and curiosity-driven discussions that foster thoughtful judgment and stewardship in youth.



Questions and Answers

TOPIC 3.1 — INVESTING WITH AN ABUNDANCE MINDSET

Q1: What does it mean to invest with an abundance mindset?

Answer: Investing with an abundance mindset means focusing on how your capital can support useful work, serve human needs, and uplift families and communities rather than operating purely out of fear or scarcity.

TOPIC 3.2 — WHERE TO START YOUR RESEARCH

Q1: What are the primary questions you should ask when beginning project research?

Answer: Start by investigating three core areas: what the project actually does, who benefits from its products or services, and how it plans to sustain its growth over time.

TOPIC 3.3 — BUILDING A DIVERSIFIED PORTFOLIO

Q1: How does a diversified portfolio support both personal values and financial growth?

Answer: Diversification ensures each asset plays a distinct role in keeping your portfolio balanced, allowing you to allocate funds across meaningful areas like community development, emerging tech, and humanitarian work.

TOPIC 3.4 — INVESTING IN QUANTUM TECHNOLOGY

Q1: What is the most important distinction to make when researching quantum technology projects?

Answer: Always evaluate what has been proven and demonstrated in real-world application versus what remains theoretical or under active development across computing, sensing, and communication.



TOPIC 3.5 — SECTORS AND SUBSECTORS

Q1: What is the difference between an economic sector and a subsector?

Answer: A sector is a broad category of businesses performing similar functions (such as Technology or Agriculture), while a subsector is a specialized niche within it (such as Robotics or Modern Farming).

TOPIC 3.6 — ACROSS THE WORLD, INVESTING IN THE GOLDEN AGE

Q1: How does international investment in productive projects contribute to global abundance?

Answer: Directing resources into real-world regional projects—such as agriculture, minerals, and advanced manufacturing—helps build infrastructure, support local livelihoods, and expand opportunities worldwide.

TOPIC 3.7 — TEACHING THE NEXT GENERATION

Q1: How can caregivers begin teaching young people about investing if they aren't financial experts themselves?

Answer: You don't need all the answers; simply follow the child's natural interests, explore lessons together, and use practice portfolios to build curiosity, thoughtful judgment, and long-term stewardship.