LESSONS FROM THE TRENCHES:
VALUE INVESTING,
ENTREPRENEURSHIP & LIFE

Rooted in sharing their half century of experience as value investors and fund managers, Whitney Tilson and his long-time partner, Glenn Tongue, have launched a new business, Kase Learning, and created an intensive, three-day, 36-hour bootcamp, Lessons from the Trenches: Value Investing, Entrepreneurship and Life.

During this seminar, Mr. Tilson and Mr. Tongue will share everything they’ve learned over the years, be available to answer all questions, and invite several veteran investors as guest speakers to share their wisdom, so that participants can stand on their collective shoulders and achieve even greater success. It’s going to be equal doses of learning, self-improvement and fun!

The seminar is designed not only for professional investors but also avid amateurs who simply want to become better investors.

Each bootcamp will be tailored to the specific interests of those attending, but in general the curriculum falls into three areas:

HOW TO BECOME A BETTER INVESTOR | 60%
- Investing lessons from our story of success, then failure
- How to find big winners (Case studies: McDonald's, Netflix, Google and Facebook)
- Avoid value traps (Case studies: Valeant and Spark Networks)
- Become a better short seller (Case study: Lumber Liquidators)
- Effectively manage your portfolio
- Determine your edge
- Develop a sound investment process
- Do effective scuttlebutt research and develop proprietary insights
- Become a leading expert (Case studies: Berkshire/Buffett/Munger and the housing crisis)

HOW TO BECOME A BETTER BUSINESSPERSON AND ENTREPRENEUR | 20%
- Learn from Whitney’s experience building – and then closing – Kase Capital
- Differentiate yourself – and your business – from the crowd
- Become a more effective salesperson and raise big money
- Develop and deliver a compelling stock pitch
- Learn how Whitney earned high honors at Harvard Business School (10 Strategies For Winning the Class Participation & Business Meeting Game)
- How to create a great slide presentation and make a killer stock pitch

THE MENTAL GAME & LIFE LESSONS | 20%
- Understand and exploit behavioral finance/investor irrationality
- Avoid the five calamities that can destroy your life
- Cultivate mentors, make friends, and develop deep relationships
- Learn how to deal with mistakes and apologize
- Make a great impression

REGISTRATION

To register, go to www.kaselearning.com.

To facilitate networking, the resumes/bios of all participants will be shared among the group (with permission), and there will be a cocktail reception at the end of each day.
SCHEDULE
In addition to the currently scheduled dates and cities, we will plan future seminars based on demand so if you are interested in attending any of our programs, please let us know by calling (212) 265-4510 or emailing info@kaselearning.com.

TUITION
The tuition is $6,995 if the bootcamp is taken-on a stand-alone basis. Most people take it, however, as part of a five-day program that includes two one-day seminars on *How to Launch and Build an Investment Fund* and *Advanced Seminar on Short Selling*. The bootcamp and one seminar are $8,995 and all five days are $9,995.

EARLY BIRD PRICE: 50% OFF
*Registration is fully refundable until one month in advance; thereafter it is fully transferable or the amount paid can be applied toward any future Kase Learning program.*

MONEY BACK GUARANTEE: After the first day of the seminar/webinar, if you are not satisfied, just let us know and we’ll refund your money.

FURTHER INFORMATION
To learn more, call (212) 265-4510, email info@kaselearning.com, or go to www.kaselearning.com.

TESTIMONIALS
In early December 2017, Mr. Tilson hosted a seminar with a dozen participants. Here’s what four of them had to say (testimonials from all 12 are available separately):

“ It was a wonderful, almost life-changing experience… it felt like an intensive infusion of wisdom and practical advice.”

“ What is taught in this seminar is pure gold. It’s not taught anywhere else and there aren’t that many people in the world who really understand what it takes to raise a billion-dollar fund.”

“ I’m lost in words while expressing my appreciation. It was the mother of all seminars. Really. It was invaluable: so many wise teachings, thoughts and reflections, and opportunities for personal growth.”

“ At the beginning of Whitney’s course, I didn’t know what to expect and had little idea of how to set up and market my business, but after only a few days it’s not an understatement that the course will make me millions of dollars and save me a great deal of trouble.”

CONTENT IS FOR INFORMATION PURPOSES; NOT INVESTMENT ADVICE; BEWARE OF TESTIMONIALS:
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AGENDA: DAY 1

LESSONS FROM THE TRENCHES:
VALUE INVESTING, ENTREPRENEURSHIP & LIFE

1. Overview and introductions
2. Part 1: The rise and fall of Kase Capital: investing lessons
3. How to achieve superior performance
   – Case studies: Berkshire Hathaway, McDonald’s
4. Look for accelerating growth
   – Case studies: Netflix, Google, Facebook
5. Avoiding value traps
   – Case studies: Valeant, Spark Networks
6. Five-company exercise
7. Cocktail reception
AGENDA: DAY 2

LESSONS FROM THE TRENCHES:
VALUE INVESTING, ENTREPRENEURSHIP & LIFE

1. Part 2: The rise and fall of Kase Capital: business/entrepreneurship lessons
2. Effective portfolio management
   – Case study: Sodastream
3. Lessons from 15 years of short selling
4. Activism
   – Case studies: Canadian Pacific and CSX
5. Finding value in out-of-favor areas
   – Case studies: JetBlue, Spirit Airlines and Hertz
6. Behavioral finance exercise
7. Cocktail reception
AGENDA: DAY 3

LESSONS FROM THE TRENCHES:
VALUE INVESTING, ENTREPRENEURSHIP & LIFE

1. Review behavioral finance exercise
2. How to avoid – and profit from – manias, bubbles and investor irrationality
3. 10-company exercise
4. Overview of Beyond Value Investing: Life Lessons from Warren Buffett, Charlie Munger (and me)
5. How to cultivate mentors, make friends & develop deep relationships
6. The five calamities that can destroy your life – and how to avoid them
7. How to raise $1 billion (or not)
8. How to make a great impression
9. 10 strategies for winning the class participation & business meeting game
10. How to deal with mistakes and apologize
11. Evaluations
12. Cocktail reception
Rooted in sharing his nearly two decades of experience as a hedge fund manager, Whitney Tilson has created a new business, Kase Learning, and launched a one-day seminar entitled How to Launch and Build an Investment Fund.

During the seminar, Mr. Tilson and his partner, Glenn Tongue, will share everything they’ve learned over the years about launching and building multiple hedge funds and mutual funds, be available to answer all questions, and invite 1-2 veteran investors as guest speakers to share their wisdom, so that participants can stand on their collective shoulders and achieve even greater success. It’s going to be equal doses of learning, self-improvement and fun!

The seminar is designed for two types of investors: a) those who aspire to launch their own funds; and b) those who are already running their own funds and would like grow them.

AGENDA
Each seminar will be tailored to the specific interests of those attending, but in general the curriculum will include:

- Make the right decision about whether/when to launch your own fund
- Decide whether to create a hedge fund or separately-managed accounts business
- Optimize the fund’s management fee, carry and redemption terms
- Choose the right service providers
- Identify and solve legal, regulatory and compliance issues
- Negotiate a partnership and/or seed deal
- Hire the right people at the right time
- Make a name for yourself and stand out from the crowd
- Target the right investors
- Raise $1 billion (or not)
- Write compelling investor letters
- Develop great slide presentations and make killer stock pitches
- Effectively manage through periods of poor performance

To facilitate networking, the resumes/bios of all participants will be shared among the group (with permission), and there will be a cocktail reception at the end of the day.

SCHEDULE
In addition to the currently scheduled dates and cities, we will plan future seminars based on demand so if you are interested in attending any of our programs, please let us know by calling (212) 265-4510 or emailing info@kaselearning.com.

FURTHER INFORMATION
To learn more, call (212) 265-4510, email info@kaselearning.com, or go to www.kaselearning.com.

REGISTRATION
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TUITION
The tuition is $2,595 if the seminar is taken-on a stand-alone basis. Most people take it, however, as part of a five-day program that includes our three-day Lessons from the Trenches investing bootcamp and a one-day Advanced Seminar on Short Selling. The bootcamp and one seminar are $8,995, all five days are $9,995, and both seminars are $4,595.

EARLY BIRD PRICE: 50% OFF
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MONEY BACK GUARANTEE: If you are not satisfied by lunch at the seminar, just let us know and we’ll refund your money.
AGENDA

HOW TO LAUNCH AND BUILD AN INVESTMENT FUND

1. Overview, introductions and agenda
2. Is now the right time to launch a fund?
3. How to choose and negotiate with a prime broker
4. Key logistical questions (hedge fund vs. separately managed accounts, fees, redemption terms, when and who to hire, whether to have a partner or seed investor, etc.)
5. How we made a name for ourselves and built our business
6. How to raise $1 billion (or not)
7. Great investor pitch decks
8. Great (and not so great) investor letters
9. How to survive periods of poor performance
10. Why I paid the Navy SEALs kick the xxxx out of me
11. How to create a great slide presentation & make a killer stock pitch
12. Evaluations
13. Cocktail reception
This long bull market has inflicted absolute carnage among short sellers, and even seasoned veterans are throwing in the towel. This capitulation, however, combined with the increasing level of overvaluation, complacency, hype and even fraud in our markets, spells opportunity for courageous investors, so there is no better time for a seminar focused solely on short selling.

On Thursday, May 3, Whitney Tilson’s Kase Learning hosted a full-day conference in NYC at which 22 of the world’s top short sellers taught the hard lessons they’d learned, revealed the questionable companies they’d identified, and shared their best, actionable short ideas.

The tremendous response to the conference has clearly shown that there’s great interest in short selling (despite – or perhaps because of – the pain most of us have been suffering!) – both in terms of learning and hearing new ideas.

Thus, Kase Learning has developed a one-day Advanced Seminar on Short Selling that will be taught as an optional additional fifth day after our two current programs (a three-day Lessons from the Trenches investing bootcamp and one-day seminar on How to Launch and Build an Investment Fund).

- Unlike the conference, the short-selling seminar will be an intimate group – no more than 20 people – because we encourage (but don’t require) each person who participates to present their favorite short idea in 10 minutes or less, plus five minutes for Q&A. In this way, participants can gain experience pitching an investment idea in a clear and concise way, a critical skill to have in this business, as well as hearing other fresh, actionable short ideas.
- In addition, participants will learn from Whitney Tilson and Glenn Tongue as they teach their module on Lessons from 15 Years of Short Selling (which includes case studies of Lumber Liquidators – which worked – and Wingstop – which didn’t) as well as a veteran short seller (two speakers from the conference, Sahm Adrangi of Kerrisdale Capital and Mark Hiley from The Analyst, will be the guest speakers in NYC and London, respectively).
- Lastly, we will be looking for especially talented investors to whom we can offer a speaking slot at one of our future short-selling conferences, which we’re planning to host twice a year in NYC (the next one is scheduled for Monday, Sept. 24). This is an extraordinary opportunity for anyone looking to make a name for themselves.

**AGENDA**

The seminar will start with breakfast at 7:30 a.m., followed by the program from 8:00 a.m. until 6:30 p.m. (with morning, lunch and afternoon breaks), and end with cocktails, leaving ample time for networking.
TUITION
The tuition is $2,595 if the seminar is taken-on a stand-alone basis. Most people take it, however, as part of a five-day program that includes our three-day Lessons from the Trenches investing bootcamp and a one-day seminar on How to Launch and Build an Investment Fund. The bootcamp and one seminar are $8,995, all five days are $9,995, and both seminars are $4,595.

EARLY BIRD PRICE: 50% OFF
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MONEY BACK GUARANTEE: If you are not satisfied by lunch at the seminar, just let us know and we’ll refund your money.

REGISTRATION
To register, go to www.kaselearning.com.

SCHEDULE
In addition to the currently scheduled dates and cities, we will plan future seminars based on demand so if you are interested in attending any of our programs, please let us know by calling (212) 265-4510 or emailing info@kaselearning.com.

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AGENDA

ADVANCED SEMINAR ON SHORT SELLING

1. Overview, introductions and agenda
2. Lessons from 15 years of short selling – Part 1
3. Case studies: Lumber Liquidators and one other
4. Guest speaker
5. Lessons from 15 years of short selling – Part 2
6. Participant stock pitches
7. Case studies: Tesla, Plus 500, Wingstop
8. Guest speaker
9. Evaluations
10. Cocktail reception
From September 4 - 21, Kase Learning will teach via live webinar the Lessons from the Trenches investing bootcamp, followed by a seminar on How to Launch and Build an Investment Fund, and Advanced Seminar on Short Selling.

Rather than the full days we teach in person, we’re breaking the programs into 15 modules – 9 for the bootcamp, 3 for the investment fund seminar, and 3 for the advanced short selling seminar – that we will teach in 2½-hour sessions that will take place live every day from 7:00 - 9:30am EST.

WEBINAR BENEFITS

The webinar offers big advantages for participants:

- **No need to take time off of work:** The webinar is only 2½ hours/day and takes place before work hours for those in the U.S., Canada & Latin America, in the middle of the day in Europe, the Middle East and Africa, and after work hours in Asia (India, China, Singapore, Australia).
- **No need to travel:** Anyone, anywhere in the world, can take the webinar using a smartphone, tablet or computer.
- **More affordable:** Participants won’t incur any travel or hotels costs and, because we don’t have to pay for renting a room, providing meals, etc., we’re pricing the webinar at less than half of our normal tuition, with an especially big discount for early registrants.

SCHEDULE

The webinar will be held daily 7:00 - 9:30am EST:

- **Lessons from the Trenches** investing bootcamp Tues. - Sat. September 4 - 8 and Mon. - Thurs., September 10 - 13
- **How to Launch and Build an Investment Fund** September 14, 17, 18 (Fri., Mon., Tues.)
- **Advanced Seminar on Short Selling** Wed. - Fri., September 19 - 21

Note: No class Sun., September 9 and only one Saturday is scheduled.

TUITION

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<th>Bootcamp</th>
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<td>Register before Aug. 23</td>
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The tuition is fully refundable until one week out; thereafter, it can be applied toward any future Kase Learning program or transferred to someone else.

MONEY BACK GUARANTEE: After the first day of the webinar, if you are not satisfied, just let us know and we’ll refund your money.

REGISTRATION

To register, go to www.kaselearning.com.

FURTHER INFORMATION

To learn more, call (212) 265-4510, email info@kaselearning.com, or go to www.kaselearning.com.
FREQUENTLY ASKED QUESTIONS

Will the curriculum you teach during the webinar (including guest speakers) be the same as your in-person seminars?

Yes, it will be identical. We’ve posted a detailed agenda for both the bootcamp and seminar here: www.tilsonfunds.com/KaseWebinar.pdf and additional background material on Kase Learning here: www.tilsonfunds.com/KaseLearning.pdf.

Won’t I miss out on the in-person interactions with you and my fellow participants?

Yes and no. While we won’t all be in the same room, each webinar session will be live, so participants will be able to ask questions via video, seen by all of the other students, just as if we were together.

In addition, as we do for every one of our programs, we’ll compile a bio package and share it among the participants so they can connect with each other.

Finally, we’re planning to launch the Kase Learning Network, a two-day program that we’ll host twice a year, to bring together everyone who’s ever taken any of our programs for additional learning, networking, and small-group sessions. The first one will take place in NYC on Friday and Saturday, November 2 - 3.

What happens if I miss one or more sessions?

No problem – every session will be recorded and made available immediately afterward (only to participants on a password-protected site).

If I’m not part of the live program, can I watch the videos afterward?

Likely yes, but we haven’t yet decided on the details or pricing.

If you have additional questions, please don’t hesitate to contact us at info@kaselearning.com or (212) 265-4510.
TESTIMONIALS FROM
WHITNEY TILSON’S KASE LEARNING BOOTCAMP

In early December, Mr. Tilson hosted a seminar with a dozen participants. Here’s what all 12 plus an observer had to say:

“\nIt was a wonderful, almost life-changing experience. In a nutshell, it felt like an intensive infusion of wisdom and practical advice. I also really enjoyed meeting the people in the group who were, without exception, intelligent, hard-working, open-minded and friendly.” – Gabriel Grego, Quintessential Capital Management LLC

“I would absolutely recommend this seminar to anyone aspiring to run their own investment management business. What is taught in this seminar is pure gold. It’s not taught anywhere else and there aren’t that many people in the world who really understand what it takes to raise a billion-dollar fund. I think that this is an incredible product. It’s not really a proxy for business school or Columbia’s value investing program. It’s more advanced and for someone farther ahead in their career. There are so many start-up, emerging managers who have no idea how to raise money and where to start.” – Anonymous

“I’m lost in words while expressing my appreciation. It was the mother of all seminars. Really. It was invaluable: so many wise teachings, thoughts and reflections, and opportunities for personal growth. When I got back to work, I spent the entire afternoon sharing with my team the many learnings from our week together. Your humility, candor and selflessness are all great trademarks of yours and were evident during the week. You are a heck of a role model and I’m so lucky to have you as my cherished friend.” – Paco Carrillo, Mexico Value Partners

“At the beginning of Whitney’s course, I didn’t know what to expect and had little idea of how to set up and market my business, but after only a few days it’s not an understatement that the seminar will make millions of dollars and save me a great deal of trouble. Whitney laid out everything he did right in launching and growing his fund for more than a decade and then, perhaps more importantly, very honestly detailed what he did wrong. Through his connections, we also met with investors at the very top of the industry who were very generous with their time and open to all questions. Lastly, I now have 12 friends who are very bright and at a similar point in their careers who I can bounce ideas off of, a clear plan for how to market and grow the business (it’s encouraging when you hear Bill Ackman tell you he likes your plan), and most importantly I know what pitfalls to avoid.” – Angelo Martorell, Martorell Capital Partners

“As a young analyst trying to get ahead, this was the shot in the arm I needed. I know the hedge fund world has become increasingly challenging and competitive, so I’ve been looking for any leg up I could find – and the seminar delivered, far surpassing my expectations. I was blown away by the one-on-one, personalized attention and can’t imagine a better way to learn than from Whitney’s case-based format. I left the seminar a better investor, entrepreneur and, unexpectedly, better person. Highly recommended!” – Jeremy Lichtman, SevenSaoi Capital

“I was incredibly psyched to be a part of the seminar, but I wasn’t sure what to expect. Given some of the reading material, I assumed it would involve more theory and I was pleasantly surprised that wasn’t the case. One thing I didn’t expect was that there would be so much wisdom and life lessons intertwined with investing. I think this is a brilliant addition and one of the many ways that you can differentiate this program. If I had heard before the start that it would involve a discussion on marriage, I would have thought it was strange, but experiencing this in real time amongst the group was transformative. These tangents combined with endless practical advice on investing and raising money convinced me that there is no other program like this in the world.” – Anonymous

“Your seminar was outstanding. I didn’t expect to get so much out of it. Not only did we learn about investing, but also how to become better people. The group of people that you put together was significantly better than I could have imagined. I am looking forward to further strengthening my relationships with all of them and will try to contribute to each person’s future success. Also, I truly enjoyed our meetings with some of the world best investors, especially Tom Russo, who is a great personality; listening to his investment philosophy was like music to my ears.” – Fabian Degen, Deutsche Asset Management

“I would HIGHLY recommend it! I already have a bunch of people who I think would be interested and perfect candidates.” – Peter Gylfe, Bay Street Capital Partners

TO LEARN MORE OR RSVP, CALL (212) 265-4510 OR GO TO WWW.KASELEARNING.COM
Thanks again for all you’ve done for us. Your class was a profoundly life changing experience, and I think the rest of the guys would concur.” – Jon Costello, Costello Investment Management, LLC

Whitney exceeded expectations and delivered a high quality seminar filled with excellent content, including nine meetings with industry insiders. It was extremely refreshing to learn from his experiences (including mistakes!) first-hand, as this is a business where rarely someone gets second chances. This seminar is must-do for anyone working at a hedge fund, as not only will you learn to analyze investments the right way, but you will also have a great sounding board to test your ideas (without putting any capital at risk). Whitney could have easily charged 10x for the seminar, and it still would have been a great bargain.” – Anonymous

The seminar was a great experience. There are many books and courses teaching value investing, but this was truly unique in that you have the opportunity to learn from an actual practitioner who is open and honest, not only about his successes but also about his failures. Not only was Whitney forthcoming about all aspects of his career, good and bad, but his guest speakers also spoke frankly about their experiences and what it takes to be successful in the industry in 2017. The other seminar participants were incredibly impressive and I expect the relationships I forged to last a lifetime.” – Anonymous

Thank you very much for a great week. I found "Whitney's Worldly Wisdom" particularly insightful and helpful. It doesn't matter how well you invest - if you're reckless in your habits or are experiencing a divorce/splitting with your spouse, your chances of doing well are dramatically reduced. Learning from peers in both the classroom and offline discussions is another immense, unexpected benefit. Unexpected in the sense that it’s easy to take for granted when you’re registering for the seminar, but you assembled a terrific group.

The guest speakers were great, each in their own way. Let’s take a high profile one like Bill Ackman: despite zillions of interviews and biographies you can read about him, there’s something very special about hearing directly from him what it was like to start his fund in those early days and the adversity he and his partner faced. Even simple words of encouragement like “there are always wealthy people out there willing to bet on a younger manager with little to no track record because often the track record is the manager himself and his ideas/case studies.” These stories and lessons stay with you and are invaluable.” – Rob G.

I would highly recommend Whitney's seminar to anybody who has a goal of launching a hedge fund or has already launched a fund and wants to achieve long-term success. There has been no place where you can learn how to maximize your probability of success - both as an investor and a hedge fund entrepreneur / businessperson. Working and killing it as an analyst and getting an MBA are helpful and provide a great foundation but they are not targeting specific issues of how to make a hedge fund successful. For example, at Stanford business school I was exposed to various investment styles and learned how to analyze industries and sustainable competitive advantage, build models and value companies. During the seminar, I learned how to balance contrarian investing with humility, build a team, select vendors, communicate with investors, and develop a fundraising strategy (just to name a few). These were things that were never covered in business school.

When I launched Caro-Kann Capital, friends who were few years ahead of me gave me a hand, but I ended up learning a lot by doing. There was no better way to do it three years ago, but now there is!

Whitney is an incredible teacher. He has wealth of knowledge and experience, and he has been an active and very well-respected member of the investment community for many years. On top of that, Whitney has an extremely high level of self-reflection, which means that he was able to effectively share with us how he achieved success as well as how he fell short. Very few people who have been running funds for decades can do that. Such ability to share and teach requires a certain type of personality and internal wiring, and Whitney has both. Finally, Whitney is fully committed to his students’ success, which was apparent by how much time he spent with us during the seminar (8:15am to 7:30pm daily, sometimes followed by dinner!). Whitney is not the type to run out the door at 5:01pm!

If you are running a fund or planning to do so, you need to do whatever you can to maximize your chance of success. You owe it to yourself and – more importantly – your investors. Participating in Whitney’s seminar and being an active learner will help you achieve exactly that.” – Artem Fokin, Caro-Kann Capital LLC

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