

THE SAVVY INVESTOR'S AI TOOLKIT

Master the Markets with Smarter
Prompts and Sharper Strategies

STARTER EDITION

STOCK SAVVY DAD

Welcome to The Savvy Investor's AI Toolkit

(Starter Edition)

If you're new to the stock market, you're not alone. Everyone starts somewhere and it's never too late to build wealth through investing.

The good news? You don't have to figure it all out by yourself.

This free starter pack shows you how to use ChatGPT to guide your investing journey, from understanding the basics to buying your first stock. These aren't generic prompts. They're designed to help you level up and act with confidence.

Think of this like Mario's warp whistle, your shortcut to the next level, without all the stress of battling every boss along the way. With AI as your co-pilot, you can skip the guesswork and start making smarter money moves.

Just copy, paste, and adjust a few details. You're in control.

*Disclaimer: This guide is for educational purposes only and does not constitute financial advice.
Always do your own research before making investment decisions.*

You've mastered the basics. Ready to invest like a pro?
Real strategy starts with your next click ([Get the Premium Edition!](#))

Your Starter Prompts

1. Start Here - Set the AI Role

Act as my personal AI investing assistant. I'm a beginner looking to buy my first stock. Break everything down in simple, easy-to-understand steps, and explain any financial terms I might not know. Assume I've never invested before and guide me all the way through—from choosing a stock to placing my first trade. Stay encouraging and patient throughout the process. Please confirm you understand.



2. Learn How the Stock Market Works

Can you explain how the stock market works to someone completely new? Keep it clear and use real-world analogies to make it easy to grasp.



3. Understand Your Investor Identity

Help me figure out what type of investor I am. Ask me a few questions to understand my goals, risk tolerance, and time horizon.



4. Learn About Different Stocks

Give me a breakdown of the different types of stocks like blue-chip, growth, dividend-paying, and speculative with pros and cons for each.



5. Researching Stocks

Walk me through how to research a company before investing. What key factors including metrics should I look at, and why do they matter? Use Apple as an example to show how this works.

Get more tips at: [https://stocksavvydad.com/](https://stocksavvydad/)

Your Starter Prompts

ProTip: Make it Yours

These prompts are just a starting point. Feel free to tweak them, ask follow-up questions, or mix them up. You're in control of the conversation.



6. Master Your Investing Emotions

Give me a clear, step-by-step approach for staying calm when markets drop significantly. Include one quick breathing or mindset reset I can use in the moment and how to frame market drops as opportunities rather than threats.



7. Create a Watchlist

Help me create a starter watchlist of 5–10 fundamentally strong companies to keep an eye on. I'm a beginner looking for stable, well-known businesses.



8. Opening a Brokerage Account

What are the best beginner friendly brokerages in (your country) and what are the steps to opening a brokerage account? What should I be aware of as a first-time investor?



9. Place My First Trade

Walk me through how to place my first trade to buy a stock (with X brokerage firm) step-by-step. Explain terms like market order and limit order too.



10. Build a Beginner Portfolio Strategy

Given what I told you about me as an investor, help me build a simple starter investment strategy with a mix of stocks and/or ETFs. Keep it beginner-friendly and easy to manage.

The SSD logo, which consists of the letters 'SSD' in white on a dark green shield-shaped background.

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Pro Prompts

Pro Prompts - Level Up

You've got the core toolkit to start making confident, informed investing moves in less time. But I want to give you a few extra tools you can start using right now, especially if you're ready to go beyond the basics.

11. Spot the Big Picture Moves

Give me a plain-English summary of the biggest forces currently driving the stock market (e.g., interest rates, inflation, major news). Explain why they matter and how they could affect the market in the next 3–6 months.

12. Break Down Earnings Reports

Summarize the most recent earnings report for [Company Name]. Highlight revenue, profit, guidance, and one key takeaway in simple terms. Include whether results beat or missed expectations and what that might mean for the stock.

13. Best Performing Sectors

List the top three performing sectors in the U.S. stock market over the past six months. For each, explain why they're performing well and name two example companies to watch in that sector

14. Wall Street's Take

Summarize what major Wall Street analysts are currently saying about [Company Name]. Include the average price target, the general rating (buy/hold/sell), and one key reason analysts feel that way

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You Did it! That's a Savvy Move

Most people talk about investing . You took action and that puts you in rare company.

By walking through this guide and testing out the prompts, you've done more than just learn. You've invested in your future, sharpened your mindset, and started building the kind of money habits that actually lead to wealth.

This is how generational change begins, with everyday decisions, small wins, and consistent effort. So take a second to acknowledge that. You're further ahead than you were yesterday.

Ready to Go Deeper?

If this guide helped you start strong, don't stop here. The Premium Toolkit gives you the next-level prompts and strategy to take action with clarity before the next opportunity passes you by.

Here's what you'll unlock:

- ✓ The confidence to invest with purpose, not panic
- ✓ Prompts that help you cut through noise and spot real opportunities
- ✓ A repeatable system to analyze stocks and build smarter portfolios
- ✓ Tools that help you avoid costly mistakes before they happen
- ✓ The mindset shift from guessing to growing — for good

You've already started investing in yourself.
Now's the time to keep that momentum going.

 [Unlock the Full Toolkit Now](#)

Don't wait until the next market swing to realize you're unprepared. Level up now — and invest with confidence every step of the way.

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