

My Investment Portfolio



Name _____

Date _____

Imagine you are investing the money you earn into a portfolio. Consider your risk tolerance, age, and current financial health. Using the information you've learned about investment vehicles, how would you create a diversified portfolio to best put your money to work?

Illustrate your answer by creating a pie chart.



DEFINITIONS

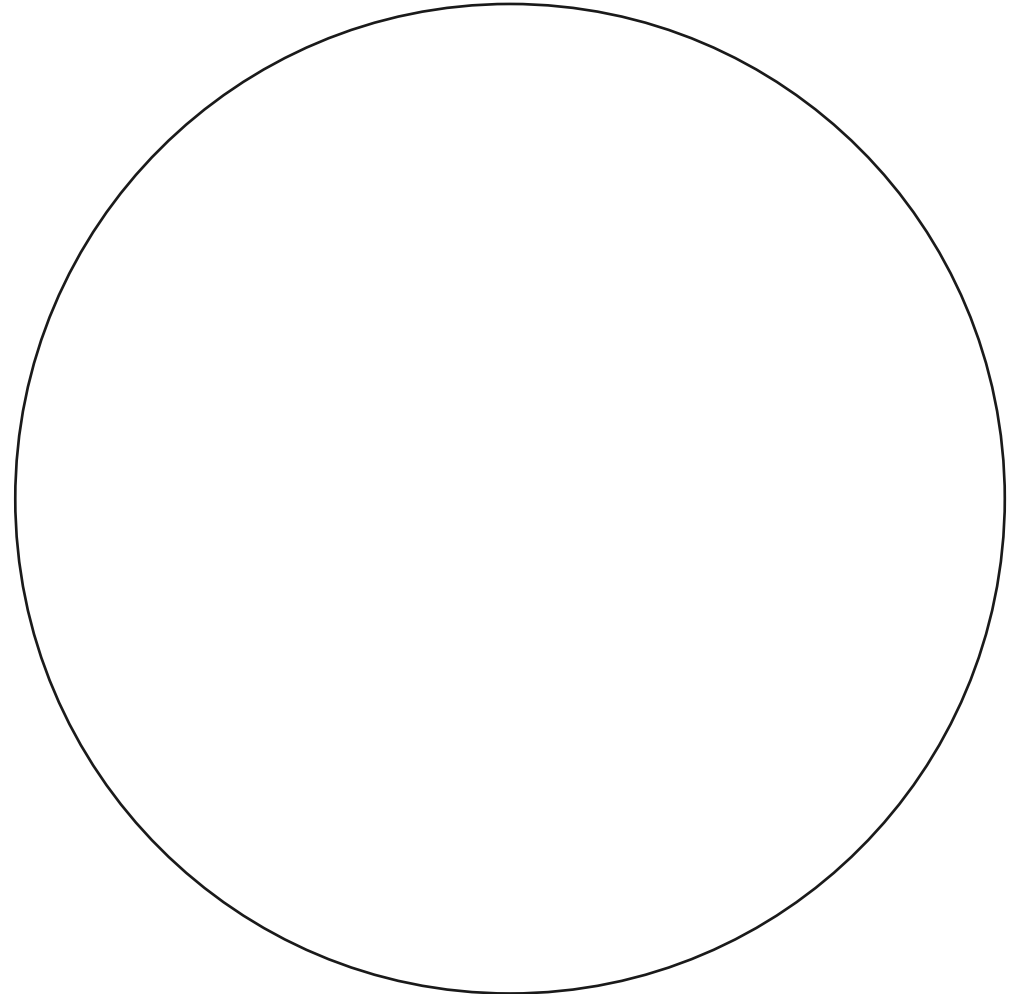
Savings Account: A deposit account held at a bank that accrues interest over time

Money Market Account: A deposit account that pays interest based on the current interest rates in the money markets

Mutual Fund: An investment program that is professionally managed and trades in diversified stock holdings

Bonds: Money loaned to a company that then pays you interest over time

Individual Stocks: Individual shares from a single company



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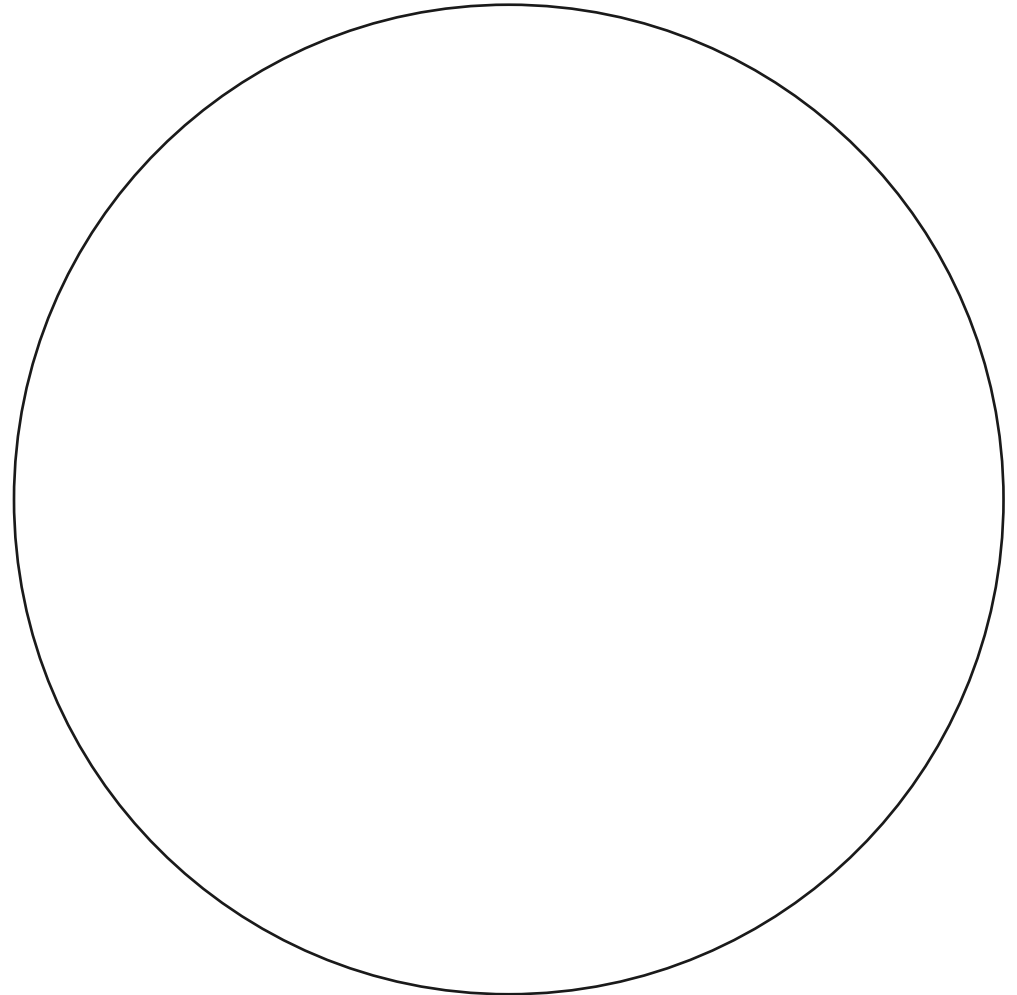


Name _____

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Imagine you are a parent with children and a home. Consider your risk tolerance, financial health, and your time horizon. Using the information you've learned about investment vehicles, how would you create a diversified portfolio to best put your money to work?

Illustrate your answer below by creating a pie chart.



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