

## Investing

How is planning for a vacation similar to planning your financial future?

What big purchase will you make in the next...

**5 Years**                      **10 Years**                      **20 Years**

1.

1.

1.

### **Four Goals to Financial Planning**

1.

2.

3.

4.

\_\_\_\_\_ investments that pay you.

\_\_\_\_\_ investments that you pay.

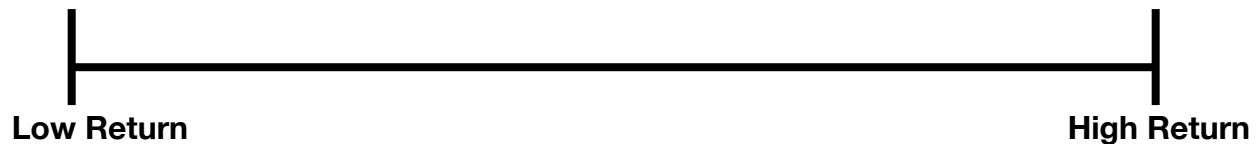
Examples:

1.

1.

2.

2.



Describe the relationship between risk and age?

### **Rule of 110**

Subtract your age from \_\_\_\_\_ and this is the % of your portfolio that should be in the stock market or any other high-risk investment.

Checking Account

Savings Account

Certificate of Deposit

**Rule of 72-**

Treasuries

T-Bond-

T-Note-

T-Bill-

**Investment Options**

Real Estate

Mutual Funds