**Financial Plan Report**

1. Based on the Financial Plan Worksheet Data, how much money will you have to invest at the end of a 3‐month period?

Answers will vary.

1. What type of investor are you? Answers will vary.
2. What types of investments go with which type of investor you are?

These should match up with the Financial Plan Pyramid, so have them turn in that form with the test.

1. How would you invest your money? Use the chart and a calculator to fill in the table. Answers will vary.

|  |  |  |
| --- | --- | --- |
| **Amount** | **Type of Investment** | **Percentage** |

Investment 1

Investment 2

Investment 3

Investment 4

Investment 5

***Note: To add rows, highlight the last row>right click>insert row.***

1. What is one, main advantage to starting out young when investing?

Invest for less amount time and get more @ retirement. Answers may vary.

1. What is one, main disadvantage to starting out young when investing?

Don’t want to tie up money in an investment that you can’t get to until age 65. Answers may vary.

1. What are some advantages to waiting until you’re older to start investing?

You have all the money you’ve earned available to spend right now. Answers may vary.

1. What are some disadvantages to waiting until you’re older to start investing? You may not have as much to invest. Answers may vary.
2. What is the maximum amount of total earned interest you are allowed in a year to be able to use the 1040 EZ Form?

$1500.00

1. Are individual, yearly investment totals reported on a W2? No