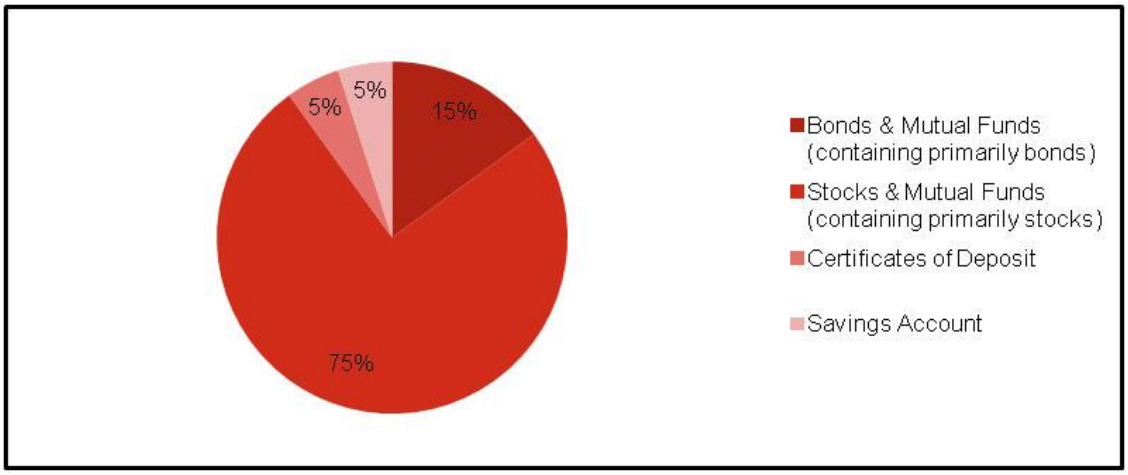
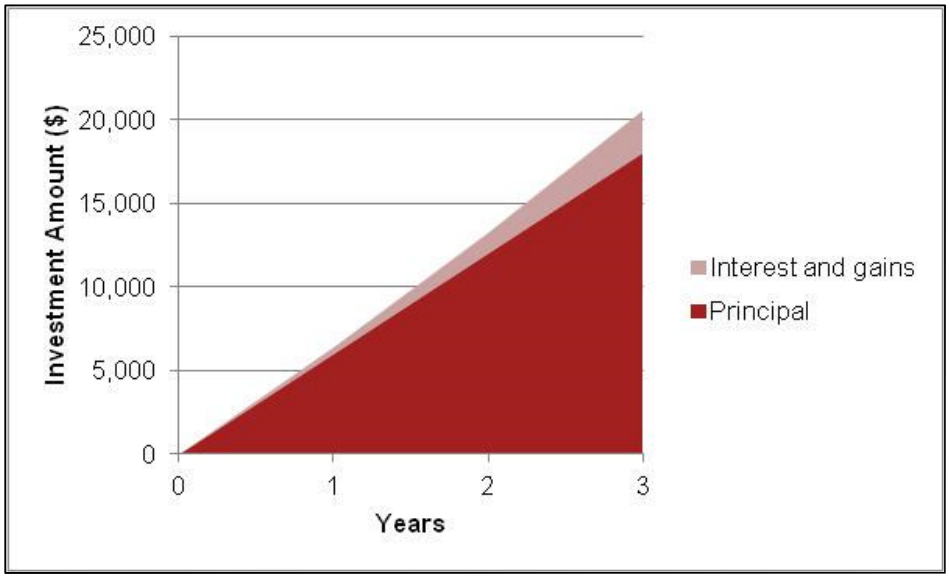
Handout D
Facilitator's Guide

Patrick-Option #2

Based on the information provided, including Patrick's tolerance for risk and an aggressive approach, students should have chosen option #2 to present to the class. A potential visual that they might include in their presentation is a pie chart showing the allocation of investment types (see below) or graph showing the growth of the total investment.





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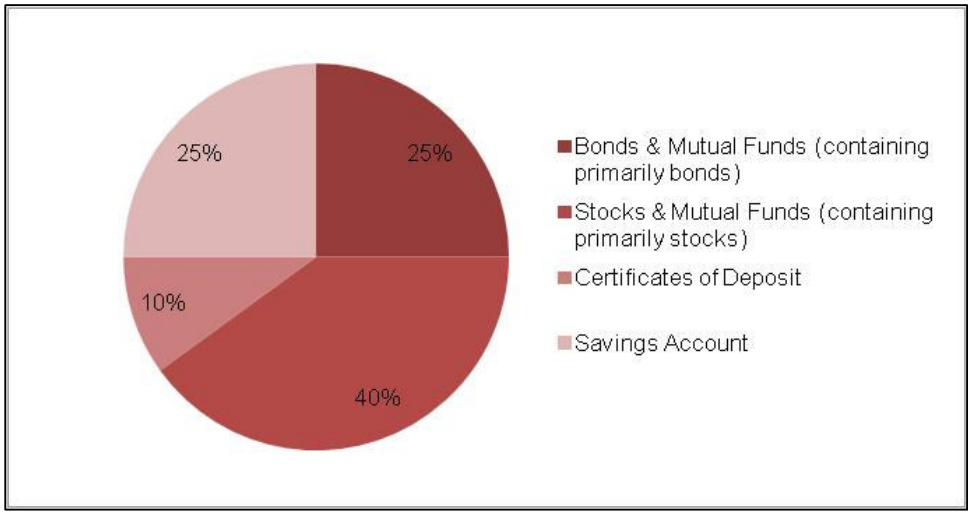
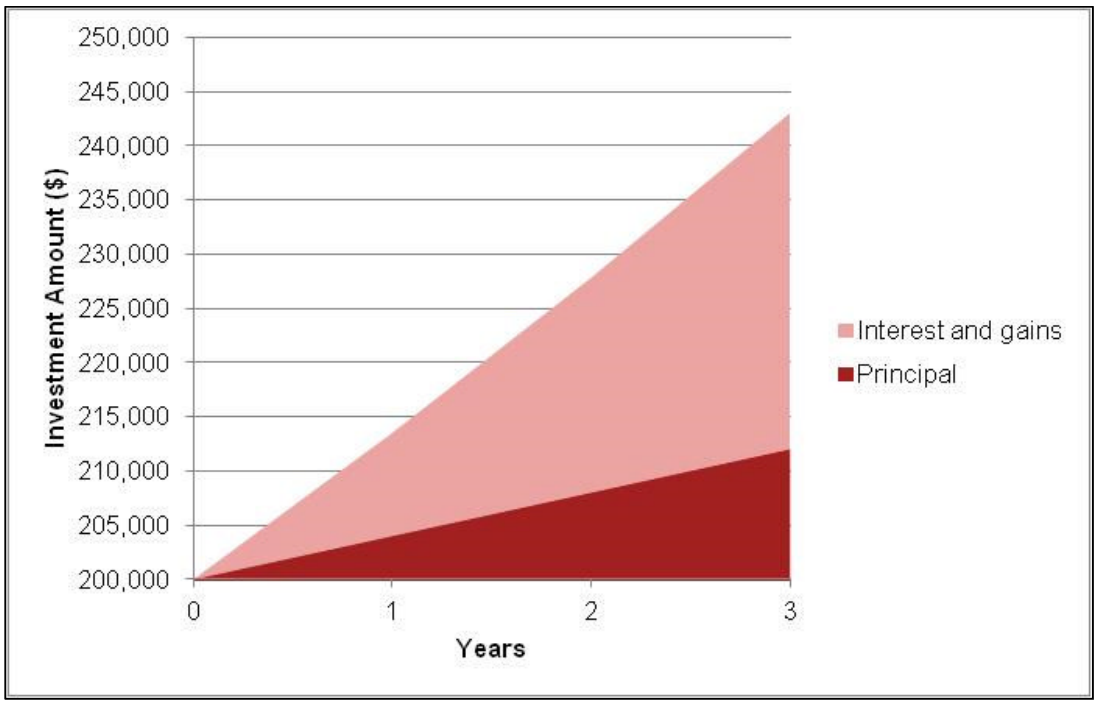
Lynne-Option #3

Based on the information provided, Lynne has a need for liquidity in the upcoming years and a moderate tolerance for risk. Of the portfolios, #3 would probably be the best option for her given that it holds 25% in a Savings Account that she can easily access while also still earning moderate returns from stocks, bonds, and CDs. Below are two potential visuals that students might have include in their presentation, a pie chart showing the allocation of investment types and a graph showing the growth of the total investment.





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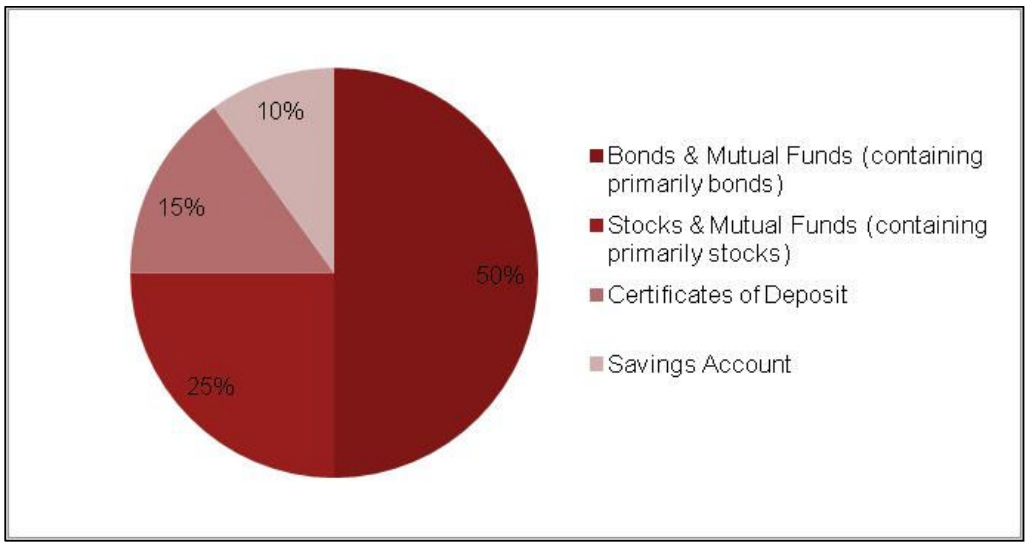
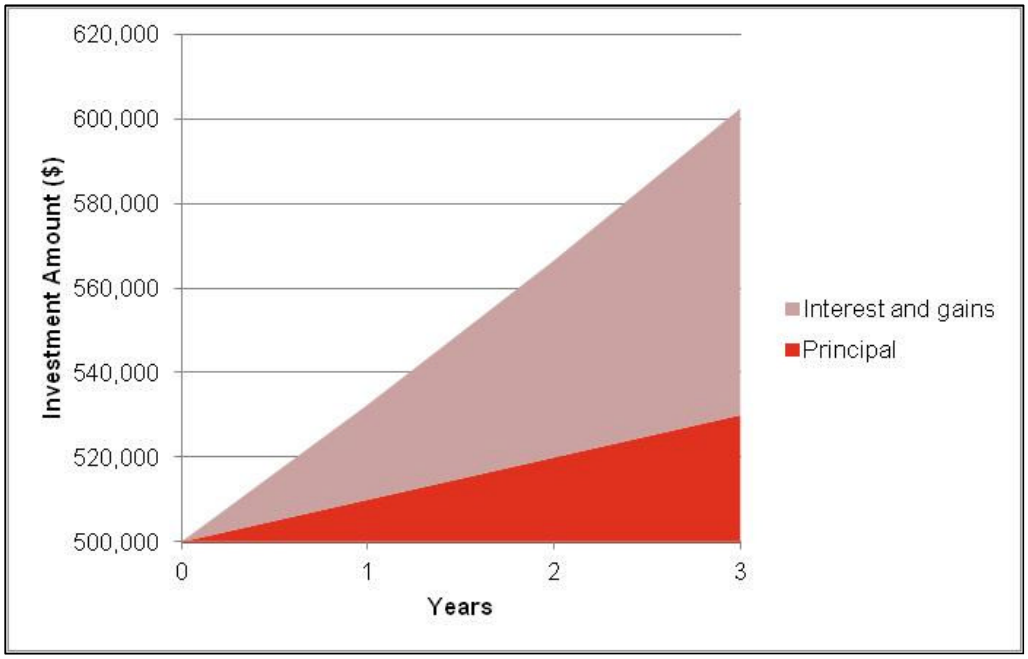
Tracey-Option #1

Based on the information provided, Tracey is looking for more stable investment options and has a low tolerance for risk. Of the portfolios, #1 would probably be the best option for her given that it holds only 25% in stocks and stock based mutual funds which are highest risk of all of the investment types. It's heavier in bonds which are still estimated to have decent returns at around 4% and are lower risk. Below are two potential visuals that students might have included in their presentation, a pie chart showing the allocation of investment types and a graph showing the growth of the total investment.





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