**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?
2. What type of investor are you?
3. What types of investments go with which type of investor you are?
4. How would you invest your money? Use the chart and a calculator to fill in the table.

|  |  |  |
| --- | --- | --- |
| **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 are some advantages to starting out young when investing?
2. What are some disadvantages to starting out young when investing?
3. What are some advantages to waiting until you’re older to start investing?
4. What are some disadvantages to waiting until you’re older to start investing?
5. What is the maximum amount of total earned interest you are allowed in a year to be able to use the 1040 EZ Form?
6. Are individual, yearly investment totals reported on a W2?