

Q&A Worksheet

So now you know...Where do you go next?

1. What is the purpose of asset allocation? What do you plan to take into consideration when spreading out your assets?

2. What are the three basic asset classes? What investments do you have in each of these classes? What were your considerations when you made these investments?

3. One way to diversify is by asset class. What are other examples of a diversification strategy? How have you diversified your investments?

4. Asset allocation may be based on your time horizon, financial goals, and/or risk tolerance. What's your next step based on what you learned today?

Name _____

Date _____

