

Q&A Worksheet

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

1. Think about where you currently are in the Retirement Marathon. What are your financial needs now and your financial future goals?

2. Most investors with long-term goals are patient, rather than constantly moving their money in reaction to the markets or the media. What mistakes or good decisions have you made?

3. Diversification (the practice of investing in a variety of investment vehicles), and then weighting investment choices to one's risk tolerance, is a good practice. What might you change about your investment to improve diversification?

4. Some investors fall prey to fads, and get-rich quick schemes. Has this ever happened to you? How will you handle the temptation to act on a hot tip in the future?

5. What are your next steps following this presentation?

Name _____

Date _____

