

## 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?

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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?

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3. As discussed, today's high performer can be tomorrow's loser. How have you allocated your investments to account for this? If not, what might you do differently in the future?

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

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5. 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?

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Name \_\_\_\_\_

Date \_\_\_\_\_

