

# Assessment

## Personal Finance

Name \_\_\_\_\_

Assume you are going to invest in each of the following. Do some research in the local newspaper or library or call an investment firm to help fill in the following information.

<p>Name of a company you think you be good to buy stock in:</p> <p>Company's stock symbol: \ Stock exchange it is traded on:</p> <p>Current price:</p> <p>Highest price in last 52 weeks:</p> <p>Lowest price in last 52 weeks:</p> <p>Average dividend to stockholders during last year:</p>	<p>Name of bank where you would deposit \$10,000 into a CD:</p> <p>Interest rate:</p> <p>Length of deposit:</p> <p>Penalty for early withdrawal:</p> <p>Total amount you will have at end of the investment period:</p>
<p>Name of a bond you would like to invest in:</p> <p>Current cost:</p> <p>Current interest rate:</p> <p>Historical rate of return (last year)</p> <p>Last ten years:</p> <p>Last 20 years</p> <p>Why you think this would be a good investment:</p>	<p>Name of a mutual fund you would consider investing in:</p> <p>Minimum investment:</p> <p>Historical rate of return (last year)</p> <p>Last ten years:</p> <p>Last 20 years:</p> <p>Why you think this would be a good investment:</p>

If you had \$100,000 to invest in a combination of these four types of investments, how would you "split up" your investments and why?