

## PERSONAL FINANCE

### LAP 8 – The Fundamentals of Investing



Name \_\_\_\_\_

Period \_\_\_\_\_

Date Started \_\_\_\_\_

Date Completed \_\_\_\_\_

**DoDEA Standards**

- PT1m** Understand the selection and acquisition of information systems
- PT4a** Access information efficiently and effectively.
- PT4b** Evaluate information critically and completely
- PT5a** Apply knowledge gained from individual assessment to a comprehensive set of goals and individual career path

**Objectives**

- ◆ Explain why investing is important
- ◆ Identify investment alternatives and their relative risk
- ◆ Locate and evaluate sources of financial information

**Resource**      *Business and Personal Finance* Chapter 8 Fundamentals of Investing  
 Workbook  
 Financial Planner Software **SA08-1.xls**  
 Standard and Poor’s Extension **Activity 8**

**Time Frame**    5 hours

**Introduction**

Choosing the right investments for YOUR financially successful future

**Assignments**

**Where appropriate and possible, written answers must be in complete sentences and keyed.  
 Turn in completed activities as directed by instructor.**

_____	<b>Read</b>	pp. 236-250		
_____	<b>Complete</b>	p.240	<u>What’s Your Financial ID</u>	
_____	<b>Complete</b>	p. 250	<u>Check Your Understanding</u>	Question 1
			<u>Using Communication Skills</u>	Question 5
			<u>Solving Money Problems</u>	Question 6
_____	<b>Read</b>	pp. 251-258		
_____	<b>Complete</b>	p. 256	<u>Case Study</u>	Questions 1-3
_____	<b>Complete</b>	p. 258	<u>Check Your Understanding</u>	Questions 1-3
_____	<b>Read</b>	pp. 259-267		
_____	<b>Complete</b>	p. 267	<u>Check Your Understanding</u>	Questions 2-3
_____	<b>Complete</b>	p. 268	<u>Review Key Concepts</u>	Question 3
_____	<b>Complete</b>	p. 269	<u>Apply Key Concepts</u>	Question 1

