

Name: _____

Date: _____

Building Portfolios

You are an investment manager. Build a personalized investment portfolio for your client by listing the companies included in the portfolio below. Your client must have six investments in total, and there must be at least one of each type of investment in the portfolio. The key is to choose an appropriate blend of investments, based on the level of risk your client is comfortable with.

Client Name: _____

Type of Investor: _____

(conservative / moderate / aggressive)

Personalized Investment Portfolio

(Six investments in total)

Mutual Funds
of mutual funds _____

Bonds
of bonds _____

Stocks
of stocks _____

Client Name: _____

Type of Investor: _____

(conservative / moderate / aggressive)

Personalized Investment Portfolio

(Six investments in total)

Mutual Funds
of mutual funds _____

Bonds
of bonds _____

Stocks
of stocks _____
