



Overview
 I have just won the lottery and received \$25,000. I now need to put money into an Aggressive investment, a Moderate investment, and a Conservative investment. I don't want to lose all of my money right of the back so I'll put some in all risk levels. Now I must choose what kind of Aggressive, Moderate, and Conservative investments I will make.
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Aggressive Investment Plan
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Moderate Investment Plan
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Conservative Investment Plan

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Whose Money Is It Anyway? (C)



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Aggressive Investment Plan

Name of company or investment:

Contact information:

Company details:

Type of investment

● Risk level

Expected rate of return

Minimum required investment (dollar amount)

Why are you interested in this investment? (Be sure to discuss statistics found in research and include at least five sentences.)

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Moderate Investment Plan

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Mutual Fund

- a. Shares of ownership in a group of companies. Require a minimum amount of money to invest. Can earn significantly more money but also can potentially lose more.
- b. A mutual fund earns money by having shares in multiple companies and the return is the amount of money you will earn back.
- c. There is a moderate risk in my investment. Not only could it possible help me gain a lot of money it could also potentially lose me a lot of money as well.
- d. I would invest \$5,000 in the Sequoia Fund and \$5,000 in the Vanguard Mid Cap ETF. This helps me to further diversify my investment.

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Conservative Investment Plan

Certificate of Deposit (CD)

- a. Will earn more than traditional savings. Bank will charge money if you take your money out early. Requires a minimum amount of money to invest.
- b. This investment won't earn much money and will take a while to earn that money, but it will grow consistently.
- c. There is little to no chance that I will lose my money in this investment.
- d. I would invest my last \$5,000 in Ally Bank for 5 years with a 1.68% interest rate. At the end of the 5 years I will have gained \$438.38.

Overview

I think that it is stupid to invest all \$25,000 into one investment. It is much better to have a diversified investments. I have created a very diverse investment plan for myself. It has all risk levels included. My Aggressive investments: Stocks for \$5,000 in AZZ Inc and \$5,000 in Diamond Offshore Drilling Inc. My Moderate investments: Mutual Funds for \$5,000 in the Sequoia Fund and \$5,000 in the Vanguard Mid Cap ETF. My Conservative investment: A CD for \$5,000 in Ally Bank for 5 years.

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