Lesson 8

Save and Invest—Investing for a Lifetime
Instructional Objectives

Students will:

• Create a diversified portfolio.

• Compare different strategies of investing over a 40-year simulation.

• Compare annual rate of return and portfolio value, based on a group-selected mix of investments.
Building Wealth Mutual Funds

Investment Objective:
The Building Wealth Large Cap Fund seeks to track the performance of the Building Wealth Large Cap Index, an index that measures the return of many large companies traded on the Building Wealth Domestic Stock Exchange.

Ticker Symbol: BWLCF
Inception Date: June 8, 1996
Standard Deviation: 20.28%
Maximum One-Year Return: 53.99%
Minimum One-Year Return: -43.34%
Average Lifetime Returns: 11.74%

Portfolio Breakdown:
- Technology
- Financial Services
- Manufacturing
- Mining/Extraction
- Other
Changing Your Allocation

**Year 1**

Initial Value: $10,000

Allocation:

BWLCF  ____%  BWMCF  ____%  BWSCF  ____%  BWIIF  ____%  BWBIF  ____%

Strategy/Remarks

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**Year 1**

Initial Value: $________

Allocation:

BWLCF  ____%  BWMCF  ____%  BWSCF  ____%  BWIIF  ____%  BWBIF  ____%

Strategy/Remarks

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A Lifetime of Investing
Assessment