

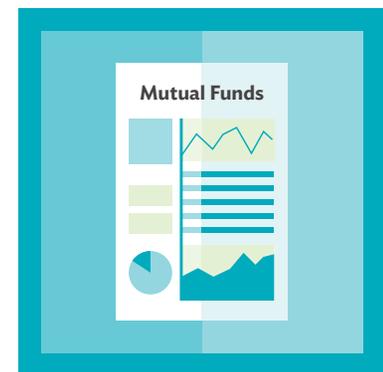
Building **Wealth**

In the Classroom

Interactive Lessons

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.

Changing Your Allocation

Year 1

Initial Value: \$10,000

Allocation:

BWLCF ___% BWMCF ___% BWSCF ___% BWIIF ___% BWBIF ___%

Strategy/Remarks

Year 1

Initial Value: \$_____

Allocation:

BWLCF ___% BWMCF ___% BWSCF ___% BWIIF ___% BWBIF ___%

Strategy/Remarks



A Lifetime of Investing



Assessment