

Investment Fundamentals

I M A G E L I S T

0010 Welcome	0230 Employer-Sponsored Retirement Plans <i>Bonus slide</i>
0020 Workshop Objectives	0240 Individual Retirement Accounts
0030 Our Commitment	0250 Annuities <i>Bonus calculator</i>
0040 Evaluation Form	0260 Types of Annuities
0050 About Your Workbook	0270 Myth/Truth #4
0060 Why Do You Want to Invest? <i>Bonus workbook exercise</i>	0280 Starting Now Pays Later
0070 Five Myths and Truths of Investing	0290 Mutual Funds and ETFs
0080 Myth/Truth #1	0300 Why Do People Invest in Mutual Funds and ETFs?
0081 How Stocks Work <i>Bonus slide</i>	0310 Types of Funds <i>Bonus slide</i>
0090 Historical Performance of Stocks	0320 Dollar-Cost Averaging
0100 Stockholder Risks	0330 Dollar-Cost Averaging
0101 Unpredictability of Financial Markets Over Different Time Periods	0340 Myth/Truth #5
0110 Lower Risk Over the Long Term	0350 The Benefit of Professional Guidance
0120 Myth/Truth #2 <i>Bonus slide</i>	0360 Diversification
0130 Types of Bonds	0370 Diversification <i>Bonus slide</i>
0140 Historical Performance of Bonds	0380 Asset Allocation
0150 Bondholder Risks	0390 Personalizing Your Asset Allocation Model
0160 Value of a Bond When Interest Rates Fall 1%	0400 Investment Objectives
0170 Value of a Bond When Interest Rates Rise 1% <i>Bonus slide</i>	0410 Time Frame
0180 Myth/Truth #3	0420 Historical Investment Performance
0190 Inflation <i>Bonus calculator</i>	0430 Risk Tolerance <i>Bonus workbook exercise</i>
0200 Taxes	0440 Sample Asset Allocation Model: Conservative Portfolio <i>Bonus slide</i>
0210 Taxes Take a Toll on Returns <i>Bonus calculator and workbook exercise</i>	0450 Sample Asset Allocation Model: Aggressive Portfolio <i>Bonus slide</i>
0220 Advantages of Tax-Deferred Growth	

Investment Fundamentals

I M A G E L I S T

- 0460** Keep Expectations in Check
Bonus calculator
- 0470** Do These Strategies Really Work?
- 0480** A Tale of Two Portfolios
- 0490** Robert's Approach
- 0500** Karen's Approach
- 0510** Two Different Scenarios
- 0520** Five Myths and Truths of Investing
- 0530** Where Do You Go from Here?
- 0540** Where Do You Go from Here?
- 0550** Evaluation Form
- 0560** What to Bring
- 0570** Thank You

Bonus features

- For Slide 0060:*
0580 What Are Your Goals? (*workbook exercise*)
- For Slide 0081:*
0590 Investment Taxes to Consider
- For Slide 0120:*
0600 How Bonds Work
- For Slide 0170:*
0610 Changing Interest Rates
- For Slide 0190:*
0620 Loss of Purchasing Power (*calculator*)
- For Slide 0210:*
0630 Calculating the After-Tax Yield (*calculator*)
0640 Calculating the After-Tax Yield
(*workbook exercise*)
- For Slide 0230:*
0650 Manage Your 401(k)
- For Slide 0250:*
0660 Guaranteed Retirement Income (*calculator*)
- For Slide 0310:*
0680 Historical Performance of Mutual Funds
- For Slide 0370:*
0690 Diversification
- For Slide 0430:*
0700 How Much Risk Can You Stand?
(*workbook exercise*)
- For Slide 0440:*
0710 Twenty-Year Performance Record:
Conservative Portfolio
- For Slide 0450:*
0720 Twenty-Year Performance Record:
Aggressive Portfolio
- For Slide 0460:*
0730 Are Your Expectations Realistic? (*calculator*)