



Activity:

Considering Your Market Participation

In this activity you will consider the information presented in the lesson and identify your investment goals, hold time preferences, and selected management option related to investing in the stock market.

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The goal of this activity is to help you start to define your investment goals and style. Your answers here are just the beginning. As you enter the world of investing, you will begin to learn more about the different options and considerations. As your confidence and knowledge grow, you can explore other possibilities and combinations of strategies.

It's important to remember that learning about investing is a lifelong endeavor. Your personal goals change over time, and the markets change by the second. To accommodate these changes, you will need to modify your investment strategy to suit your needs. Keep learning about the stock market and bring together a team of qualified, trusted individuals to help you best work toward your investment goals.

Investment Goals Options

Of the goals covered, which investment goal best aligns with your personal needs?

Capital Appreciation/Growth

Income or Cash Flow

Combination ____% Capital Appreciation/Growth ____% Income or Cash Flow

Hold Time Options

Of the hold time options discussed, which appeal to you most?

Day trader

Short-term investor

Long-term investor

Combination ____% Day Trader ____% Short-term Investor ____% Long-term Investor

Management Options

How would you most like to manage your portfolio?

Active portfolio management

Passive portfolio management