

PERSONAL FINANCE

LAP 10 – Bonds and Mutual Funds



Name _____

Period _____

Date Started _____

Date Completed _____

DoDEA Standards

- ◆PT1m Understand the selection and acquisition of information systems
- ◆PT1f Be proficient in the use of technology
- ◆PT4a Access information efficiently and effectively.
- ◆PT4b Evaluate information critically and completely
- ◆PT5a Apply knowledge gained from individual assessment to a comprehensive set of goals and individual career path

Objectives

- ◆ Identify characteristics of bonds
- ◆ Distinguish between government bonds and corporate bonds
- ◆ Compare types of mutual funds

Resource *Business and Personal Finance* Chapter 10 Bonds and Mutual Funds
 Workbook
 Standard and Poor’s Extension **Activity 10**

Time Frame 5 hours

Introduction

Using stock market investments to build your financially successful future.

Assignments

**Where appropriate and possible, written answers must be in complete sentences and keyed.
 Turn in completed activities as directed by instructor.**

_____ _____	Read Complete	pp. 305-314 p. 314	<u>Check Your Understanding</u> <u>Think Critically</u> <u>Using Communication Skills</u>	Questions 1-3 Question 4 Question 5
_____ _____	Read Complete	pp. 315-319 p. 319	<u>Check Your Understanding</u> <u>Using Math Skills</u>	Questions 1, 3 Question 5
_____ _____	Read Complete	pp. 320-326 p. 326	<u>Check Your Understanding</u> <u>Think Critically</u> <u>Solving Money Problems</u>	Question 1 Question 4 Question 6
_____ _____	Read Complete	pp. 327-335 p. 335	<u>Check Your Understanding</u> <u>Solving Money Problems</u>	Questions 1-3 Question 6
_____ _____	Read Complete	pp. 336-347 p. 347	<u>Check Your Understanding</u> <u>Using Communication Skills</u>	Questions 1-3 Question 5
_____	Complete	p. 349	<u>Apply Key Concepts</u>	Questions 4-5

- _____ **Complete** WORKBOOK
 - p. 106 Key Terms
 - p. 107 Key Concepts #8, 9
 - p. 109 Activity 2: Analyzing Mutual Funds
 - p. 112-3 Financial Portfolio
 - p. 114 Finance On-Line Mutual Fund Ratings
 - p. 30-33 Standard and Poor's Extension Activity
(Omit Critical Thinking 2 and Extension Activity)
 - p. 117 Self-Assessment Quiz
- _____ **Complete** pp. 30-33 Standard and Poor's Activity 10
(Omit Critical Thinking and Extension Activity)
- _____ **Take test**

<p>Self Assessment - "I/I can . . . "</p> <ul style="list-style-type: none">_____ compare common and preferred stock_____ discuss the major types of stock_____ explain the information contained in newspaper stock tables_____ use the common numerical measures to evaluate a stock
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