

# Saving & Investment Plan

## Directions:

1. Write down your short-, intermediate- and long-term financial goals. Make sure you have two goals for each category.
2. Design a saving and investment plan to fulfill your goals.
3. Create a diversified saving and investment plan. Make sure to include the following information:
  - Which saving and investment vehicles are you going to use
  - What are the characteristics, risk and reward of each saving or investment vehicle
  - Why are these saving and investment vehicles chosen in your plan
  - What are the potential risks of your saving and investment plan
4. Discuss your plan with your classmates.