Project #2: Creating a Retirement Portfolio

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|  | **Fund #1** | **Fund #2** | **Fund #3** |
| Vanguard Mutual Funds Selected | VWUSX  U.S.Groowth Fund Investors Shares | VWNFX  Vanguard Windsor II Fund Investor Shares | VASIX  Vanguard LifeStartegy Income Fund |
| Index Fund or ActivelyManaged Fund? | Actively Managed Fund | Actively Managed | Index |
| 10-Year Average Rate of Return | 12.43% | 9.83 % | 2.76% |
| Expense Ratio | 0.35% | 0.34% | 0.11% |
| % of Portfolio | 40% | 25% | 35% |
| Estimated Portfolio Rate of Return | 14.8% | 14.8% | 14.8% |
| Why did you select this fund? | I selected this fund due to his performance in the past 10 to 15 years, the diversification of assets allocation and the increase of the rate of return. | I selected this fund due to his performance in the past 10 to 15 years, the diversification of assets allocation and its moderate rate of return. | I selected this to have an asset less risky in my portfolio. |