

# Investment Vehicle Selector

Find the right investment vehicles based on your goals, timeline, and risk tolerance

## How to Use This Tool

Answer the questions below about your financial goals, time horizon, and risk tolerance. The tool will recommend appropriate investment vehicles and suggest an asset allocation strategy tailored to your situation.

## 1 Define Your Financial Goal

What are you saving/investing for?

### Emergency Fund

3-6 months of expenses

### Vehicle Purchase

Down payment or full cost

### Education

College or training

### Home Down Payment

First home purchase

### Retirement

Long-term savings

### Wealth Building

General investment

Target Amount (\$)

e.g., 10000

## 2 Set Your Time Horizon

When will you need this money?

Select time horizon...



## 3 Assess Your Risk Tolerance

How comfortable are you with risk?

Conservative

Moderate

Aggressive



Moderate (5/10)

If your investment dropped 20% in one month, what would you do?

Select your reaction...



## Recommended Investment Vehicles

*Complete the steps above to see personalized recommendations*

## Reflection Questions

**1. How did your time horizon influence the recommended investment vehicles?**

Consider why shorter time horizons typically favor safer investments...

**2. Why is it important to match your risk tolerance to your investment choices?**

Think about what happens when investors take on more risk than they're comfortable with...

**3. How might your investment strategy change as you get closer to your goal?**

Consider how time horizon and risk should adjust as you approach your target date...