**Save, Invest, or Spend—HONORS**

***Investment Data Sheet***

**Your Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Complete this worksheet for the investment options you research. Remember that you will have to include at least one conservative investment, one moderate investment, and one aggressive investment in your portfolio.**

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| **Conservative Investment** | |
| Name of company or investment | Vanguard Total Stock Market Index Fund (VTSAX) |
| Company details | Vanguard is a well-established investment company known for its low-cost index funds. |
| Type of investment | IMF |
| Risk level | Low to Moderate |
| Expected rate of return | Historically around 7-10% annually, but can vary. |
| Minimum required investment (dollar amount) | $3,000 |
| Why are you interested in this investment? | This fund provides broad exposure to the U.S. stock market with low fees, making it a solid long-term investment for steady growth. |

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| **Moderate Investment** | |
| Name of company or investment | iShares Core U.S. Aggregate Bond ETF (AGG) |
| Company details | iShares is a part of BlackRock, a global investment management corporation. |
| Type of investment | BOND |
| Risk level | Moderate |
| Expected rate of return | Generally lower than stocks, around 2-5% annually, but provides income and stability. |
| Minimum required investment (dollar amount) | Varies depending on the brokerage, but typically low. |
| Why are you interested in this investment? | This ETF offers diversification and a steady stream of income, balancing out the potential volatility of stocks in your portfolio. |

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| **Aggressive Investment** | |
| Name of company or investment | Tesla Inc. (TSLA) |
| Company details | Tesla is a leading electric vehicle and clean energy company.  Type of investment: Individual Stock |
| Type of investment | Individual Stock |
| Risk level | High |
| Expected rate of return | Potentially high, but also carries the risk of significant losses. |
| Minimum required investment (dollar amount) | Price of one share of TSLA, which can fluctuate. |
| Why are you interested in this investment? | You believe in Tesla's long-term growth potential and are willing to accept higher risk for the possibility of higher returns. |