**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.**

| **Conservative Investment** | |
| --- | --- |
| Name of company or investment |  |
| Company details |  |
| Type of investment |  |
| Risk level |  |
| Expected rate of return |  |
| Minimum required investment (dollar amount) |  |
| Why are you interested in this investment? |  |

| **Moderate Investment** | |
| --- | --- |
| Name of company or investment |  |
| Company details |  |
| Type of investment |  |
| Risk level |  |
| Expected rate of return |  |
| Minimum required investment (dollar amount) |  |
| Why are you interested in this investment? |  |

| **Aggressive Investment** | |
| --- | --- |
| Name of company or investment |  |
| Company details |  |
| Type of investment |  |
| Risk level |  |
| Expected rate of return |  |
| Minimum required investment (dollar amount) |  |
| Why are you interested in this investment? |  |