

Edward Jones

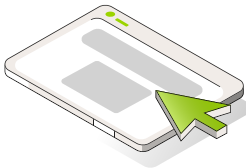
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Purpose

In this project, as a team, we had to come up with the best portfolio for 2 different couples based on their needs while taking into account their risks along with mitigating them to safely and effectively build wealthy.

2



Individual Contributions

Some ways I contributed to the project are:

- Leading the investment selections
- Teaching the team about investments and risks
- Organize our information on what we want on the slides

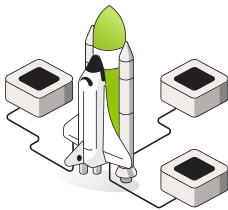
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Insights

Through this project, I learned how many risks there are in investing and how one should build a portfolio. I also learned the value of compound interest. Finally, I learned a lot of the terminology that is used in investing.

4



Future Use

In the future, I hope to use these skills for my own investment portfolio, as I am already starting right now to build my wealth early along with understanding how to properly invest with real-world, hands-on learning.

5



AI Usage

We learned how to properly prompt AI to get answers to questions we ask. While we did not use it as a source, we did have it as a starting point to branch out into more research.