



## Chapter 19, Mutual Funds

What type of funds are you interested in? Why? \_\_\_\_\_

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What types and amounts of fees are acceptable to you? \_\_\_\_\_

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Which tool or website(s) will you use to evaluate a fund? \_\_\_\_\_

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What measurements will you use to help you evaluate funds (rates, scores, ratios, etc.)? \_\_\_\_\_

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What is your ultimate goal for a fund (portfolio of funds)? How did you calculate your chances of success and the result of your choices? (A simpler method would look at very long-term performance, less fees and charges, etc., and where that rate of return, plus additional contributions, will take you by your goal or end date. A TVM calculation can do this, or refer to a fee-based fund broker for forecasting.)

# NOTES FROM A PROFITABLE INVESTOR