

Investment Alternatives Worksheet

Listed below are various investment alternatives (by category). Indicate your knowledge of each by circling a number 1 - 5 (5 = high degree of knowledge regarding the investment and 1 = very low degree of knowledge). Also indicate whether you think the investment is suitable for you.

Category	Degree of Knowledge					Suitable Investment for You		
Money market account	5	4	3	2	1	() Yes	() No	() Not Sure
T-Bills	5	4	3	2	1	() Yes	() No	() Not Sure
Corporate bonds	5	4	3	2	1	() Yes	() No	() Not Sure
Zero Coupon bonds	5	4	3	2	1	() Yes	() No	() Not Sure
Municipal bonds	5	4	3	2	1	() Yes	() No	() Not Sure
U.S. Government bonds	5	4	3	2	1	() Yes	() No	() Not Sure
Mortgage backed bonds	5	4	3	2	1	() Yes	() No	() Not Sure
Stocks	5	4	3	2	1	() Yes	() No	() Not Sure
Mutual funds	5	4	3	2	1	() Yes	() No	() Not Sure
Real estate (direct ownership)	5	4	3	2	1	() Yes	() No	() Not Sure
REIT	5	4	3	2	1	() Yes	() No	() Not Sure
Limited partnership (real estate)	5	4	3	2	1	() Yes	() No	() Not Sure
Precious metals	5	4	3	2	1	() Yes	() No	() Not Sure
Single premium life	5	4	3	2	1	() Yes	() No	() Not Sure
Universal life	5	4	3	2	1	() Yes	() No	() Not Sure
Fixed annuities	5	4	3	2	1	() Yes	() No	() Not Sure
Variable annuities	5	4	3	2	1	() Yes	() No	() Not Sure
Futures	5	4	3	2	1	() Yes	() No	() Not Sure
Options	5	4	3	2	1	() Yes	() No	() Not Sure

Material provided by Michael P. Griffin.