

On-line Investing Evaluation Worksheet

Name of Broker _____ Date _____

Resources Available On-line or at Web Site

			Comments
Free real-time quotes	Yes ()	No ()	
Free historical charts	Yes ()	No ()	
Free real-time news	Yes ()	No ()	
Free portfolio tracking	Yes ()	No ()	
Free S&P reports	Yes ()	No ()	

In Print Resources Available

S&P Stock guide	Yes ()	No ()	If Yes: Cost = \$ _____
Monthly newsletter	Yes ()	No ()	If Yes: Cost = \$ _____
Mutual Fund Performance Guide	Yes ()	No ()	If Yes: Cost = \$ _____
Other _____	Yes ()	No ()	If Yes: Cost = \$ _____

Services

Flat fee trading	Yes ()	No ()	If Yes: Cost = \$ _____
Trade via Web site	Yes ()	No ()	If Yes: Cost = \$ _____
Trade via phone	Yes ()	No ()	If Yes: Cost = \$ _____
Trade via personal account officer	Yes ()	No ()	If Yes: Cost = \$ _____
24 hour-a-day support	Yes ()	No ()	
7 days-a-week support	Yes ()	No ()	

Free Investment Services

IRA - no annual fee	Yes ()	No ()	If No: Cost = \$ _____
Dividend reinvestment	Yes ()	No ()	If No: Cost = \$ _____
Mutual fund investing	Yes ()	No ()	If No: Cost = \$ _____

Minimum Investment Amounts

Minimum to open an account	\$ _____
Minimum stock trade	\$ _____

Minimum IRA investment \$ _____

Material provided by Michael P. Griffin.