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1. \_\_\_\_\_ The possibility that an  
investment will fail to pay the expected

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return or fail to pay a return at all. 2.

\_\_\_\_\_ The rise in the general level of prices. 3. \_\_\_\_\_ The uncertainty regarding the outcome of a situation of event. 4.

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investments: Assets purchased with  
the goal of providing additional income  
from the asset itself but with the risk of  
loss Investments have the potential for

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Rate of Return Investment Risk Rate

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Return? 5% What is Derek's Rate of  
Return? 16.7% Risk: Investment Risk:  
A rise in potential return results in  
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net worth. investments are for

\_\_\_\_\_ goals.

long term. rate of return. total return on investment expressed as a percentage of the amount of money saved. total return divided by amount of money invested equals. rate of return. return.



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Summary. For far too many of us,  
we're stuck in the corporate cycle.  
Wakeup, work, sleep – and there  
hasn't exactly been an exit strategy in  
sight. Why do we do it? The income, of  
course! But what happens when that  
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From a tax perspective, there are no depreciation advantages with notes. As for appreciation, the face of the note is the face of the note, but sometimes when purchased at a discount, there can be a “phantom appreciation” because note values directly correlate to property values.

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When real estate values go up the  
value of the notes go up.

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TERM Bond Brokerage firm Capital

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Gain Discount brokerage firm Dividend  
Financial advisor Full-service  
brokerage firm Index Index fund  
Inflation Inflation risk Investment  
Investment philosophy Investment risk  
Market price Maturity date Mutual fund  
Portfolio diversification

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statements are the medium by which a  
company discloses information  
concerning its financial performance.  
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Fundamental Analysis Definition

Mutuals and ETFs - (a) Mutual prices are fixed, (b) ETFs are tradable with prices that are market driven.

Diversification is what drives the popularity of funds along with

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professional management. Funds are normally used as "base investments". Funds can be actively or passively managed and can be open or closed-end.



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