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Basic financial 2

homework's

Introduction to Investing

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Fill in the Gap

- goal
- future
- plan
- income
- security

Complete each sentence using the most appropriate word from the list above. Use each word once.

1. One of the most important aspects of financial advising is understanding a client's long-term financial _________, such as retirement or purchasing property.
2. Building a diversified portfolio ensures better financial stability in the _________, especially during market downturns.
3. Before recommending an investment strategy, it's crucial to understand the client's financial habits and current _________ sources.
4. A tailored investment _________ should reflect both the client's risk tolerance and their desired timeline for returns.
5. Many clients invest not just for growth, but also for financial _________, particularly in times of economic uncertainty.

Match the Word to the Meaning

Match each term with its most accurate definition in a financial context.

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1.Goal

2. Future

3. Income

4. Plan

5. Security

Definitions:

A. A personalized strategy outlining how a client will manage and allocate capital to achieve their financial objectives.

B. A desired financial outcome or benchmark, often used as the basis for investment strategy.

C. A client's expected or potential financial landscape beyond the present moment.

D. A consistent stream of monetary earnings from employment, assets, or investments.

E. A sense of financial protection or stability often achieved through insurance, savings, or low-risk assets.

Complete the Sentences

Use each vocabulary word to complete a sentence below. Then briefly explain the significance of the word in a professional investing context.

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Goal:
Sentence: One of my clients has set a __________ to retire by age 55.
Briefly explain:

Future:
Sentence: To prepare for the __________, we reviewed potential market trends over the next 10 years.
Briefly explain:

Plan:
Sentence: We updated the investment __________ to reflect the client's recent change in income.
Briefly explain:

Complete the Sentences

Use each vocabulary word to complete a sentence below. Then briefly explain the significance of the word in a professional investing context.

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Income:
Sentence: Diversifying passive ________ sources is essential for financial resilience.
Briefly explain:

Security:
Sentence: The client chose government bonds to maintain financial ________ during economic instability.
Briefly explain:

Writing Response

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Respond to the following prompt:

In your professional opinion, how do long-term goals and income stability influence the investment planning process?

Writing Response

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Respond to the following prompt:

In your experience, how does a client's sense of security affect their willingness to invest in moderate- or high-risk products?

Writing Response

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Read the scenario and answer the question using at least two vocabulary terms from the lesson (goal, future, plan, income, security).

Scenario:
Your client is a 38-year-old self-employed professional with an irregular income. They are concerned about not having a pension and want to begin preparing for retirement in 20–25 years.

What investment advice would you give to help this client achieve long-term financial stability?