

name: \_\_\_\_\_

date: \_\_\_\_\_



## selecting mutual funds

---



### directions

For each of the investment situations below, select the type of mutual fund that would be most appropriate from this list:

**Balanced Fund**

**Income Fund**

**Global Bond Fund**

**Industry Fund**

**Global Stock Fund**

**Municipal Bond Fund**

**Growth Fund**

**Regional Stock Fund**

1. A person wants an international mutual fund without the risks associated with stocks.
2. An investor wants tax-exempt income from investments.
3. An investor is interested in investing in health care stocks.
4. A person wants to invest in stocks from around the world.
5. A person is interested in long-term growth for future financial security.
6. An investor seeks to buy stock in companies located in Europe.
7. A retired person desires investment earnings to provide for current living expenses.
8. A person wants to invest in a blend of stocks and bonds.
9. An investor wants to invest in debt instruments issued by state and local governments.
10. A person expects growth of companies in Latin America.