

# Turbulent Times

I M A G E L I S T

<b>0010</b> Welcome	<b>0250</b> Bonds and Interest-Rate Risk
<b>0020</b> Workshop Objectives	<b>0260</b> Value of a Bond When Interest Rates Rise 1%
<b>0030</b> Our Commitment	<b>0270</b> Value of a Bond When Interest Rates Fall 1%
<b>0040</b> Evaluation Form	<b>Bonus slide</b>
<b>0050</b> About Your Workbook	<b>0280</b> Cash Equivalents
<b>0060</b> Turbulent Times	<b>Bonus calculator</b>
<b>0070</b> How Events Influenced Wall Street	<b>0290</b> Mutual Funds
<b>0080</b> Differing Opinions on Turbulent Times	<b>0300</b> Why Do People Prefer Mutual Funds?
<b>0090</b> Are You Where You Want to Be?	<b>0310</b> Types of Mutual Funds
<b>0100</b> Changes in the Economy	<b>Bonus slide</b>
<b>Bonus slide</b>	<b>0320</b> What About Your Retirement Plans?
<b>0110</b> Outlook for the Year	<b>0330</b> Advantages of Tax-Deferred Growth
<b>Bonus slide</b>	<b>Bonus calculator</b>
<b>0120</b> How Do You Succeed in Turbulent Times? A Sound Financial Strategy	<b>0340</b> How Do You Succeed in Turbulent Times? Fundamental Investment Tactics
<b>0130</b> Developing a Sound Financial Strategy	<b>0350</b> Case Study — The Taylors
<b>0140</b> Investment Objectives	<b>0360</b> Case Study — The Taylors
<b>Bonus workbook exercise</b>	<b>0370</b> Case Study — The Taylors
<b>0150</b> Time Frame	<b>0380</b> What Could They Have Done?
<b>Bonus slide</b>	<b>0390</b> Diversification
<b>0160</b> Risk Tolerance	<b>Bonus slide</b>
<b>Bonus workbook exercise</b>	<b>0400</b> Asset Allocation
<b>0170</b> Sources of Risk	<b>0410</b> Allocation for a Conservative Investor
<b>Bonus calculator</b>	<b>Bonus slide</b>
<b>0180</b> How Do You Succeed in Turbulent Times? Solid Investment Vehicles	<b>0420</b> Allocation for an Aggressive Investor
<b>0190</b> Solid Investment Vehicles	<b>Bonus slide</b>
<b>0200</b> Why Should You Consider Stocks?	<b>0430</b> How Do You Succeed in Turbulent Times? Putting It All Together
<b>0210</b> Lower Risk Over the Long Term	<b>0440</b> Case Study
<b>0220</b> What Factors Drive Stock Prices?	<b>0450</b> Keep Expectations in Check
<b>Bonus slide</b>	<b>Bonus calculator</b>
<b>0230</b> Price/Earnings Ratio	<b>0460</b> Prepare Financially for the Unexpected
<b>0240</b> Bonds	
<b>Bonus workbook exercise</b>	

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I M A G E L I S T

- 0470** Set Aside Money for a Rainy Day  
*Bonus slide*
- 0480** Keep Insurance Policies Up to Date  
*Bonus workbook exercise*
- 0490** Estate Conservation
- 0500** Putting It All Together
- 0510** How Do You Succeed in Turbulent Times?
- 0520** Where Do You Go from Here?
- 0530** Where Do You Go from Here?
- 0540** Evaluation Form
- 0550** What to Bring
- 0560** Thank You

## Bonus features

- For Slide 0100:*  
0570 Tax Cuts Won't Last Forever
- For Slide 0110:*  
0580 Historical Investment Performance
- For Slide 0140:*  
0590 What Are Your Goals? (*workbook exercise*)
- For Slide 0150:*  
0600 Time Frame
- For Slide 0160:*  
0610 Risk Tolerance Quiz (*workbook exercise*)
- For Slide 0170:*  
0620 Loss of Purchasing Power (*calculator*)
- For Slide 0220:*  
0630 Corporate Earnings
- For Slide 0240:*  
0640 Bond Quiz (*workbook exercise*)
- For Slide 0270:*  
0650 Changing Interest Rates
- For Slide 0280:*  
0660 Taxes and Inflation Take a Toll (*calculator*)
- For Slide 0310:*  
0670 Historical Investment Performance of Mutual Funds
- For Slide 0330:*  
0680 When Will You Become a Millionaire? (*calculator*)
- For Slide 0390:*  
0690 Diversification
- For Slide 0410:*  
0700 Twenty-Year Performance Record (conservative portfolio)
- For Slide 0420:*  
0710 Twenty-Year Performance Record (aggressive portfolio)
- For Slide 0450:*  
0720 Are Your Expectations Realistic? (*calculator*)
- For Slide 0470:*  
0730 Are You Going Nowhere in Cash?
- For Slide 0480:*  
0740 How Much Life Insurance Do You Need? (*workbook exercise*)