

## **Boy, This is Fund!**

You are currently working for the Investors Group, which is a large investment company. Your supervisor just arrived at the office and threw the following on your desk.

This afternoon, you are meeting with three clients and you are free to assist them in purchasing a mutual fund. The clients range in age. Your first client, Olivia, is 22 years old and has just graduated from university. She has a full time job, which pays her a gross income \$45,000 per year. Your 2 o'clock appointment is with Georgia. She is 38 years old and works at Casino Rama. Her gross income is \$32,000 per year. Your last appointment of the afternoon is with Ian. He is 51 years old and is about to retire in 6 years. He works at Wal-Mart as a Pharmacist and earns a yearly gross income of \$98,000 per year.

Your supervisor wants you to prepare a summary of what type of mutual fund you will suggest to each client. With your summary you will provide reasoning for your suggestion, as well as generate a list of questions you wish to ask the client about their future and investment goals.

Your supervisor wishes to review your summary and questions before you meet with your clients. Therefore, he wants to see it before lunch.