

## CHAPTER 2 ACTIVITY

# Name That Investment

### OBJECTIVE

The purpose of this activity is for students to categorize information learned in the lesson into specific investments.

### Teacher Directions

Hand out the student activity sheet. This activity can be used as an assessment or learning activity. You may or may not want to provide a word bank, depending on how challenging you make the activity.

### Answers

Buying the beneficiary position on a life insurance policy of someone who is dying	<i>viaticals</i>
The least liquid of all consumer investments	<i>real estate</i>
Oil and gold	<i>commodities/futures</i>
A savings account with an insurance company	<i>annuities</i>
Full of fraud and listed by the Federal Trade Commission in the top 10 scams on the market	<i>viaticals</i>
Charged a penalty if withdrawing money early from this type of bank account	<i>Certificate of Deposit</i>
100 shares of Wal-Mart	<i>single stock</i>
A debt instrument where the return comes on the interest rate paid on the loan	<i>bonds</i>
Portfolio managers who do lots of research manage this pool	<i>mutual funds</i>
You should never pay retail price and this requires a lot of cash	<i>real estate</i>
Represents a piece of ownership in a company	<i>single stock</i>
Pooling your money to invest	<i>mutual funds</i>
As interest rates rise, these prices fall	<i>bonds</i>
A six-month or one-year savings account that pays a little more interest than a regular savings account	<i>Certificate of Deposit</i>
If oil hits a certain level in 90 days, your money will increase tenfold	<i>commodities/futures</i>
Could consist of 90-200 companies	<i>mutual funds</i>

Name \_\_\_\_\_

Date \_\_\_\_\_

## NAME THAT INVESTMENT

Identify the type of investment based on the clues provided.

Buying the beneficiary position on a life insurance policy of someone who is dying

\_\_\_\_\_

The least liquid of all consumer investments

\_\_\_\_\_

Oil and gold

\_\_\_\_\_

A savings account with an insurance company

\_\_\_\_\_

Full of fraud and listed by the Federal Trade Commission in the top 10 scams on the market

\_\_\_\_\_

Charged a penalty if withdrawing money early from this type of bank account

\_\_\_\_\_

100 shares of Wal-Mart

\_\_\_\_\_

A debt instrument where the return comes on the interest rate paid on the loan

\_\_\_\_\_

Portfolio managers who do lots of research manage this pool

\_\_\_\_\_

You should never pay retail price and this requires a lot of cash

\_\_\_\_\_

Represents a piece of ownership in a company

\_\_\_\_\_

Pooling your money to invest

\_\_\_\_\_

As interest rates rise, these prices fall

\_\_\_\_\_

A six-month or one-year savings account that pays a little more interest than a regular savings account

\_\_\_\_\_

If oil hits a certain level in 90 days, your money will increase tenfold

\_\_\_\_\_

Could consist of 90-200 companies

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