

Selecting Mutual Funds for Your Portfolio – presented at 1:00 p.m.
by Keith Dorney, Financial Knowledge, a financial education organization.

Description

Participants attending this course will gain more in-depth knowledge of important factors when selecting mutual fund investments. By using real life examples and exercises, participants will attain important skills for future investment selections.

Audience

Recommended for those who desire a greater understanding of how to select mutual funds.

Materials

Each participant will receive a 55-page workbook, which reviews each topic covered, and provides resources and a glossary for future use.

Duration

2 hours

Objectives

- Learn how a mutual fund operates.
- Distinguish between investing in mutual funds vs. stocks and bonds.
- Utilize a four-step process when evaluating and selecting mutual funds.
- Find out how to determine which mutual funds are suitable for various financial goals.
- Uncover eleven popular fund types and the securities associated with each.
- Evaluate mutual funds using eight important criteria.
- Discover if a fund's name is misleading.
- Compare mutual fund performance to peer funds and indexes.
- Identify various forms of risk that impact fund performance.
- Assess the types of mutual fund fees and expenses and their impact on performance.
- Recognize hidden sales charges in many so called "no load" mutual funds.
- Discuss the three ways mutual fund investors incur taxes.
- Review turnover ratios and their impact to mutual fund investors.
- Manage to open a mutual fund account for less than the minimum using one of three different techniques.