

NAME: _____

DATE: _____

ACTIVITY

Match the Investor

What + Why: Match different investors to their strategies to figure out how people make investment decisions based on how they think and what they want.

Instructions:

1. Read each investor profile card.
2. Match each investor to a strategy by selecting it on the card:
 - **Conservative:** generally lower growth potential with lower volatility
 - **Aggressive:** higher growth potential with higher risk and volatility
 - **Diversified:** investments spread across different types
3. Explain the reasoning for your choice.

Investor 1—Malik



- 🔄 Age: 22
- 🎯 Goal: Saving for retirement in approximately 40–45 years
- 📍 Situation: Just started working full time
- 😊 Personality: Comfortable with ups and downs if it may lead to greater long-term growth

What is the best strategy for this investor?

☐ Conservative

☐ Aggressive

☐ Diversified

Why did you choose this strategy for Malik?

Investor 2—Elena



-  Age: 35
-  Goal: Saving for a child's college in 5 years
-  Situation: Has been saving consistently
-  Personality: Wants growth but is worried about losing money close to the deadline

What is the best strategy for this investor?

☐ Conservative ☐ Aggressive ☐ Diversified

Why did you choose this strategy for Elena?

Investor 3—Luis



-  Age: 45
-  Goal: Building a financial cushion with no set timeline; needs flexibility to access the money at any time
-  Situation: Self-employed with income that changes month to month
-  Personality: Prefers stability and flexibility

What is the best strategy for this investor?

☐ Conservative ☐ Aggressive ☐ Diversified

Why did you choose this strategy for Luis?

Investor 4—Tessa



-  Age: 28
-  Goal: Saving for a home down payment in the next 2–3 years
-  Situation: Has saved some money already
-  Personality: Very uncomfortable with losing money

What is the best strategy for this investor?

☐ Conservative ☐ Aggressive ☐ Diversified

Why did you choose this strategy for Tessa?

Investor 5—Darius



-  Age: 30
-  Goal: Building long-term wealth over the next 30–35 years
-  Situation: New to investing
-  Personality: Wants strong growth but gets nervous when values drop

What is the best strategy for this investor?

☐ Conservative ☐ Aggressive ☐ Diversified

Why did you choose this strategy for Darius?