

NAME: _____

DATE: _____

ACTIVITY

Financially Me: Personal Investment Pathway

What + Why: Plan how your investment strategy evolves over time so you can make decisions that balance growth, risk, inflation, and changing real-world conditions.

Your financial decisions change as your life changes. Use what you've learned to design how your investment strategy might evolve across different stages of your life.

Your **Personal Investment Pathway** will become the Financially Me component of your FinanceFolio for this topic.

Instructions:

For each stage (age 25, 35, 65), complete the following:

1. Choose an investment strategy (like conservative, aggressive, or diversified; active vs. passive).
2. Explain your risk tolerance and why it fits that stage.
3. Describe your diversification approach.
4. Explain how inflation would impact your decision.

Age 25

Strategy:	
Risk Tolerance:	
Diversification Approach:	
Inflation Impact:	

Age 35

Strategy:	
Risk Tolerance:	
Diversification Approach:	
Inflation Impact:	

Age 65

Strategy:	
Risk Tolerance:	
Diversification Approach:	
Inflation Impact:	

Submission:

Turn in your completed work as directed by your teacher.