

NAME: _____

DATE: _____

CASE STUDY

Amara's First Three Pathways

What + Why: Examine Amara's three potential pathways and predict how each one might behave. Using what you know about access, stability, and growth, decide where each pathway fits.

Supporting Materials:

Saving vs. Investing Pathways (Ages 18-22) (Case Study)

Instructions:

1. Review the **Saving vs. Investing Pathways (Ages 18-22)** case study chart.
2. Fill in the Amara's First Three Pathways chart.

Be prepared to explain which details from the case study chart influenced your answers.

Amara's First Three Pathways

	Pathway A (HYSA 4.5%)	Pathway B (Broad Index Fund 7%)	Pathway C (Blended 50/50)
What might happen to the money if Amara needed it before age 22?			
How easy would it be to access quickly?			
How much could the value go up or down?			