

**FINRA Investor Education Foundation
Content Modules**

1. [Preparing to Invest](#)

- 1.1. Introduction: Saving and Investing
- 1.2. Create a Budget—and Pay Yourself
- 1.3. Set Investment Goals
- 1.4. Establish an Emergency Fund
- 1.5. Choose Investments Wisely
- 1.6. Practice Good Habits

2. Key Investment Concepts

- 2.1. Introduction
- 2.2. Return and Rate of Return
- 2.3. The Risk-Return Relationship
- 2.4. Time and Your Portfolio
- 2.5. Allocating Your Portfolio
- 2.6. Diversifying Your Portfolio
- 2.7. Rebalancing Your Portfolio
- 2.8. Dollar Cost Averaging
- 2.9. Investing Tax Strategies

3. Bank Products

- 3.1. Introduction
- 3.2. Safety in Banking: FDIC Insurance
- 3.3. Transaction Accounts
- 3.4. Deposit Accounts
- 3.5. International Remittances
- 3.6. Beyond Banking

4. US Treasury Securities

- 4.1. Treasury Debt
- 4.2. Marketable Securities: Bills, Notes, and Bonds
- 4.3. Investment Risk
- 4.4. Buying and Selling Treasuries
- 4.5. Using Treasuries
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- 5.1. Introduction
- 5.2. Stock
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- 5.4. Mutual Funds
- 5.5. Exchanged Traded Funds
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6. Retirement Savings Vehicles

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- 6.2. Individual Plans
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7. Choosing the Right Investments

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- 7.3. Planning for Your Financial Goals
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- 7.7. Your Risk Tolerance
- 7.8. Managing Your Portfolio
- 7.9. Investing in Your Twenties
- 7.10. Investing in Your Thirties and Forties
- 7.11. Investing in Your Fifties
- 7.12. Investing in Your Sixties and Beyond

8. Managing Investment Risk

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- 8.2. Why Take Risks?
- 8.3. Types of Investment Risk
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- 8.7. Risk Protection

9. Evaluating Performance

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- 9.5. Tracking Performance
- 9.6. Reading Your Statement
- 9.7. Using Research

10. Investment Professionals

- 10.1. Introduction
- 10.2. Types of Investment Professionals
- 10.3. Choosing an Investment Professional
- 10.4. Checking an Investment Professional's Background
- 10.5. Working with an Investment Professional
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11. Safeguarding Your Investments

- 11.1. Introduction
- 11.2. Recordkeeping
- 11.3. Protecting Your Investments
- 11.4. Investor Rights and Protections
- 11.5. Investment Scams
- 11.6. Filing a Complaint

12. Supplemental Worksheets

- 12.1. Worksheet: Retirement
- 12.2. Worksheet: Financial Planning
- 12.3. Worksheet: Net Worth
- 12.4. Worksheet: Risks