



stock types

EXAMPLE

Description	Account Type	Type(s) of Stock(s)
Taraji earns \$45,000/yr as an actress. She is yrs old and single. She owns her home with a \$700,000 mortgage, but only has \$10,000 saved for retirement.	Brokerage	Value, Growth

Description	Account Type	Type(s) of Stock(s)
Caresha earns \$250,000/yr as a socialite and recording artist. She is 29yrs old and single with two children. She has \$100,000 and wants to start a podcast.		

Description	Account Type	Type(s) of Stock(s)
Beatrice is 38yrs. old and a small business owner who makes \$1,000,000/yr. She has \$55,000 in an old 401K account and \$32,000 in a Roth IRA. She is looking to sell her business and retire in 7yrs.		

Description	Account Type	Type(s) of Stock(s)
Shanita is a Director of People Operations for a tech company and earns \$122,000 with stock options and a has an IRA with \$215,000. She is married to Jamal who is a barber and earns \$67,500/yr and has \$8,000 in a money market. They are pregnant with their second child and have a 5yr. old girl. They have a townhome but are looking to buy a larger home.		

Description	Account Type	Type(s) of Stock(s)
Tiffany is 47yrs old and is a cosmetologist. She earns \$87,000/yr and have a savings account with \$43,000. Her 27 yr old daughter and 3yr old grandson live with her in a 2-bedroom apartment. She would like to retire and travel in 10yrs.		