**Stock 1**

**Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Symbol:\_\_\_\_\_\_\_ Price:\_\_\_\_\_\_\_\_ 52 Wk Low:\_\_\_\_\_\_ 52 Wk High:\_\_\_\_\_\_\_**

**Industry:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description/Why you chose this stock?**

**Stock 1**

**Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Symbol:\_\_\_\_\_\_\_ Price:\_\_\_\_\_\_\_\_ 52 Wk Low:\_\_\_\_\_\_ 52 Wk High:\_\_\_\_\_\_\_**

**Industry:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description/Why you chose this stock?**

**Mutual Fund Family**

**Family Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fund/Type with Highest YTD Return:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fund/Type with Lowest YTD Return:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Stock Fund**

**Family/Fund Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Symbol:\_\_\_\_\_\_\_ NAV:\_\_\_\_\_\_\_**

**52 Wk Low:\_\_\_\_\_\_ 52 Wk High:\_\_\_\_\_\_\_**

**Description/Why you chose this fund?**

**Bond Fund**

**Family/Fund Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Symbol:\_\_\_\_\_\_\_ NAV:\_\_\_\_\_\_\_**

**52 Wk Low:\_\_\_\_\_\_ 52 Wk High:\_\_\_\_\_\_\_**

**Description/Why you chose this fund?**