

Final Review & Exam

Financial Math

Exempt from Final Exam: You must complete **either** Option 1 **or** Option 2 as the Final Review.

Not Exempt: You must complete **BOTH** Option 1 **AND** Option 2 as your Final Review and Exam

Final - Option 1 – Investing

Option 1: Complete BOTH A and B.

A. Stocks: Research the following stocks. Use the Option 1 – Charts (Pages 1-4)

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|---------------------|----------------------|
| 1. American Express | 6. Merck |
| 2. AT&T | 7. Walmart |
| 3. Caterpillar | 8. Walt Disney |
| 4. Coca-Cola | 9. You pick a stock |
| 5. Amazon | 10. You pick a stock |

B. Indexes: Research the following index funds. Use the Option 1 - Charts (Page 5)

1. Dow Jones Industrial Average (DJIA)
2. S&P 500
3. NASDAQ Composite
4. Russell 2000 Index Mini-size Fu
5. A 5th index that you are interested in investing in

Final - Option 2 - Banking

Option 2: Complete BOTH C and D.

C. Checking Accounts: Select 4 banks or credit union checking accounts. Use the Option 2 – Charts (Pages 1-2). You must have at least one bank and at least one credit union. Gather information about the checking accounts. Then state which institution you would choose to open an account with and why.

D. Credit Cards: Select 4 credit cards. Use the Option 2 – Charts (Pages 3-4) Gather information about these cards. Your best source of information will be the “Card Disclosure” also known as a Schumer Box. Then state which card you would choose to use and why.