

Lesson 1

DIY Investor Cards: Print and cut out each card

DIY INVESTOR CARD

Client A: Young and fearless

Age: 24

Just started a new tech job
Saving for a house in seven to ten years
Likes taking risks
Excited by stocks, especially tech companies

Goal: Grow wealth quickly

DIY INVESTOR CARD

Client B: Cautious and comfortable

Age: 55

Solid, stable job
Planning to retire in eight years
Nervous about market crashes
Prefers steady growth, dislikes big losses

Goal: Build a secure retirement fund

DIY INVESTOR CARD

Client C: Be balanced

Age: 38

Two kids, mortgage and college savings needs
Wants a balance of safety and growth
Okay with some risk but doesn't want major losses

Goal: Save for both college and retirement

DIY INVESTOR CARD

Client D: The side hustler

Age: 29

Freelance photographer with unpredictable income
Wants some investments but needs emergency savings
Medium to high risk tolerance

Goal: Grow wealth without locking up all their money

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Client E: The ultra conservative

Age: 61

Retiring in two years

Terrified of losing savings

Only trusts banks and government bonds

Goal: Protect retirement savings, no big risks

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Client F: The new grad

Age: 18

Just finished high school

Wants to save for a car and college in three or four years

Doesn't know much about investing yet, but wants to learn

Open to simple, flexible investments with moderate risk

Goal: Grow savings slowly while keeping options open