

Presented by the Alliance for Investor Education



FUNDING YOUR FUTURE

The 2017 Investor Boot Camp

DECEMBER 5

The Army and Navy Club, Washington, DC

Panel 1:
What's Next?
Investing for
the Long Term

Moderator - Don Blandin, president and CEO, Investor Protection Trust

Kerry Hannon, author and columnist for The New York Times, Forbes and AARP

Christina Kilroy, vice president, Investment Company Institute Education Foundation

Randy Nordby, board of directors, CFA Society Washington DC

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Christina Kilroy
Vice President, ICI Education Foundation

About the ICI Education Foundation

- » Since 1989, ICI Education Foundation has developed, delivered, and promoted investor education
- » Partners with other investor-focused groups



Partnership with Junior Achievement

- » Financial education for middle school students
- » More than 20,000 DC-area students a year interact with ICIEF's Investing Road Trip



Road Trip!



- » Choose your destination, route, and vehicle
- » Investing—and road trips—go more smoothly with up-front planning

Get Invested

- » Make your money work for you
- » Potential for assets to grow substantially, especially over time



Where Do You Want to Go?

- » This decision lays the groundwork for others that follow
 - » College
 - » New home
 - » Secure retirement
 - » ?

What are your savings goals?

Are your savings goals short-term, long-term, or somewhere in the middle? Clearly identifying your savings goals is key to determining how you should invest your money.

Let's Roll

- » Speedy highway or slow road?
- » Pay the toll
- » Get roadside assistance
- » Stay the course, even with some bumps in the road

Where to Find Us

www.icief.org



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