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 2: *What's Next? Managing Investing Risks and Rewards*

***Moderator - Jason Doss**, president, The PIABA Foundation*

Robert Stammers, director of investor engagement, CFA Institute

Peter Chandler, director, Investor Education, Financial Industry Regulatory Authority (FINRA)

Wayne Thorp, vice president and the senior financial analyst, American Association of Individual Investors (AAII)

Maximize Tax-Advantaged Saving for Retirement

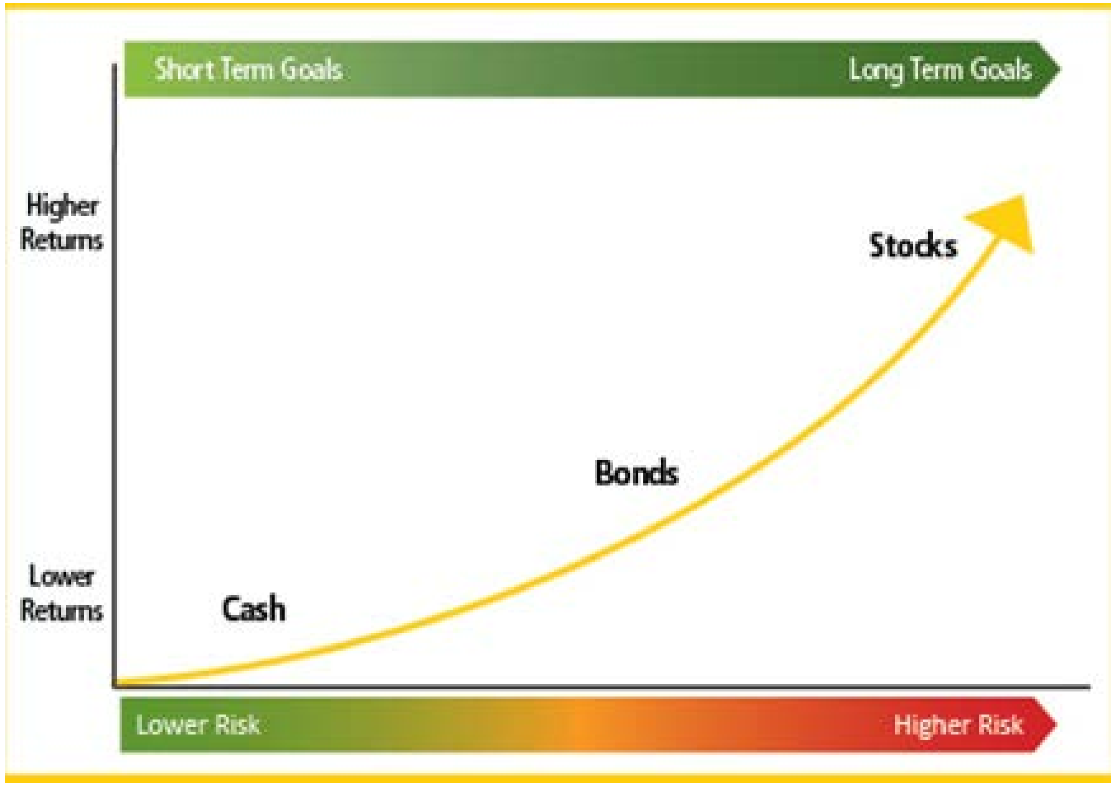
How do you stack up?

Age Group	Average 401(k) Balance	Median 401(k) Balance
Under 25	$4,154	$1,325
25-34	$22,256	$8,192

Apply an annualized growth rate of 8% to 25-34 year olds and this $22K translates to more than $220,000 compounded savings in 30 years -- and that doesn't even include the effect of future 401(k) contributions. Currently, the younger generation is on track to save more than the current pre-retiree (55-64) age group.

FINRA®

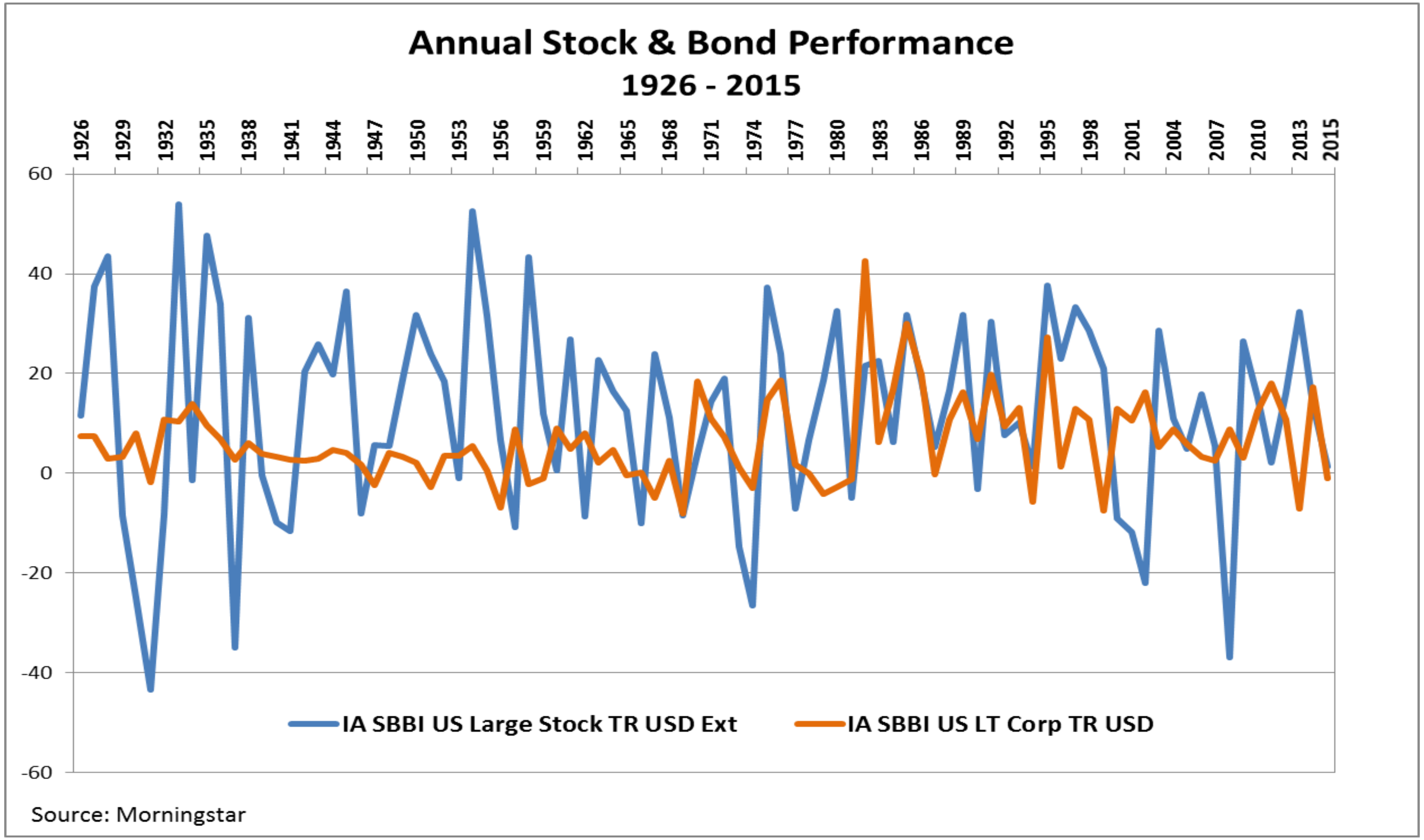
Understand Risk and Return



	Short Term	Medium Term	Long Term
Asset Class	Cash	Bonds (Fixed Income)	Stocks (Equity)
Investment Types	Savings accounts, CDs and money market funds	Government, municipal and corporate bonds and bond funds	Stocks and stock funds
Return	1.5%	5.5%	9.9%
Chief Risks	Inflation, interest rate changes	Interest rate changes, default	Volatility, falling prices

Low Risk → High Risk

…but Understand Volatility



Check Professionals on BrokerCheck®

FINRA®

Panel 2: *What's Next? Managing Investing Risks and Rewards*

Moderator - Jason Doss*, president, The PIABA Foundation*

Robert Stammers, director of investor engagement, CFA Institute

Peter Chandler, director, Investor Education, Financial Industry Regulatory Authority (FINRA)

Wayne Thorp, vice president and the senior financial analyst, American Association of Individual Investors (AAII)

Presented by the Alliance for Investor Education

Funding Your Future

The 2017 Investor Boot Camp

DECEMBER 5

The Army and Navy Club, Washington, DC