Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **Fund Type** | **Description** | **Example Funds** |
| * Large
 |  |  |
| * Medium
 |  |  |
| * Small
 |  |  |
| * Bond
 |  |  |
| * Index
 |  |  |
| * Target Date
 |  |  |
| * Specialty
 |  |  |