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

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