

Personal Finance Professional Development

Title of Web Conference: Investing for Your Future 2: Mutual Funds & Tax Deferred Investments

Date: Thursday, March 14, 2013

Connection Information: <https://learn.extension.org/events/932>

Speaker: Dr. Barbara O'Neill

Continuing Education Credit: 1.5

Issue: Building skills and confidence to help service members to access timely, accurate, and trustworthy information about investing. This presentation is part 2 in a 2 part series. "Investing for Your Future 1" will be presented March 4, 2013.

Recent Research:

Kozup, John C., Elizabeth Howlett and Michael Pagano (2008), The Effects of Summary Information on Consumer Perceptions of Mutual Fund Characteristics, *Journal Consumer Affairs*, 42(1), 37-59. <http://bit.ly/VBpbu2>

Hanna, S. D. & Lindamood, S.(2008). The decrease in stock ownership by minority households. *Journal of Financial Counseling and Planning*, 19(2), 29-45.
<http://www.extension.org/pages/28695/decrease-in-stock-ownership-by-minority-households>

Cooperative Extension Resources:

Investing in Mutual Funds Chat Session Transcript:

<http://www.extension.org/pages/14712/investing-in-mutual-funds>

A Comparison of Mutual Funds and Exchange Traded Funds: 12 Factors to Consider:

<http://www.extension.org/pages/17993/a-comparison-of-mutual-funds-and-exchange-traded-funds-etfs:-twelve-factors-to-consider>

What is the difference between a life-cycle fund and a target-date mutual fund?

<http://www.extension.org/pages/42495/what-is-the-difference-between-a-life-cycle-mutual-fund-and-a-target-date-mutual-fund-are-they-the-sa>

Other Resources:

What is a mutual fund? [VIDEO]: <http://www.youtube.com/watch?v=fpcvJiO-rjk&feature=related>

U.S. Securities and Exchange Commission: <http://www.sec.gov/investor/pubs/inwsmf.htm>

Personal Rating System: A Six-Step Guide to Choosing the Right Mutual Funds for You:

http://articles.marketwatch.com/2007-08-26/finance/30744309_1_style-and-discipline-funds-with-sales-charges-mutual-funds

Mutual Fund Education Alliance: <http://www.mfea.com/>