

Shopping for Savings Account/Investment Products Work Sheet

	Savings product 1	Savings product 2	Savings product 3
	_____ (name)	_____ (name)	_____ (name)
Amount needed to open account or buy product			
Annual percentage yield (APY)			
Time needed to access money			
Fees involved, if any			
Fees for early withdrawals, if any			
Amount of risk involved			
Other fees			
Other things to ask: <ul style="list-style-type: none"> • Is my account insured if it is in a bank or credit union? • Am I comfortable with the amount of risk involved in investing my money? 			