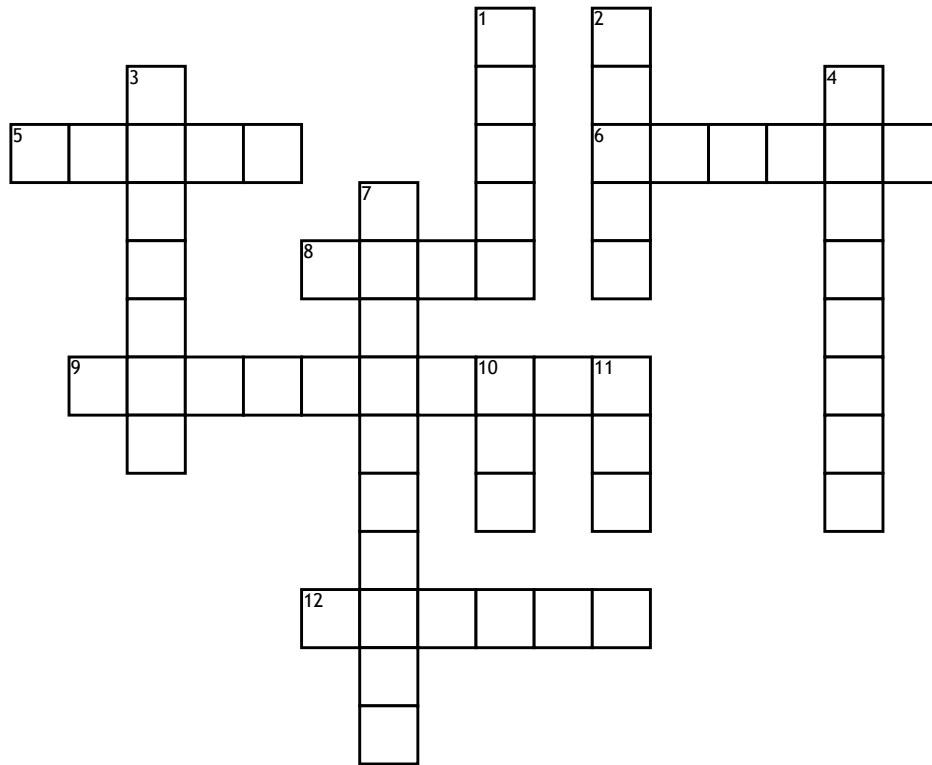


Financial Planning and Investment Terms Crossword Puzzle



Across

5. What do you call a legal entity created by an individual in which one person or institution holds the right to manage property or assets for the benefit of someone else?
6. What kind of funds does a hedge fund use to earn alpha for its investors?
8. What do you call evidence of a debt in which the issuer promises to pay the holders of this financial product a specified amount of interest and to repay the principal at maturity?
9. What financial products value is based on an underlying security, commodity or other financial instrument?

12. What is a type of trust created by a person during his or her lifetime?

Down

1. What is the amount of current income provided by an investment?
2. What is the coefficient that measures risk-adjusted performance, factoring in the risk due to the specific security, rather than the overall market?
3. What kind of contract is standardized, transferable, and exchange-traded and requires delivery of a commodity, bond, currency, or stock index, at a specified price, on a specified future date?
4. What do you call evidence of an investment, either in direct ownership (as with stocks), creditorship (as with bonds), or indirect ownership (as with options)?
7. What term is used to describe the range of price swings of a security or market over time?
10. What is the abbreviation of a type of retirement account in which contributions are deductible from earned income in the calculation of federal and state income taxes if the taxpayer meets certain requirements?
11. What's the commonly used acronym for a marketable security that tracks a stock index, a commodity, bonds or a basket of assets?