

Comparing Mutual Funds

Consult mutual fund rating services at your local library or fund prospectuses to gather the following information about the funds you are considering.

Key Questions	(Option 1)	(Option 2)	(Option 3)
Mutual Fund Type or Category (Stock, bond, cash management)			
Mutual Fund Objective (Aggressive growth, growth, growth & income, income, capital preservation)			
Current Rate of Return (Yield)			
Yield Range in Last Three to Five Years			
What is the Risk Level of this Fund? (High, medium, low)			
Load fees (Sales and redemption charges)			
Total Operating Expenses (Management fees, advertising, and marketing costs as a percentage of average net assets)			
What is the minimum investment required?			
How/where are fund shares bought and sold?			
What shareholder services are available?			