

# Open Forum 1

## Web Site Worksheet

### Chapter 6

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

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

#### 1. Preparing to Listen

**You are going to listen to a conversation between a financial advisor and a customer at a bank. Before you listen, think about the following questions.**

What do you think a financial advisor is?

If you want to save money for the future, what are the best ways for you to do so?

#### 2. Listening for Main Ideas

**Read the list of topics below. Listen to the conversation. Number the topics in the order they are mentioned.**

- \_\_\_\_\_ Stacey's financial goals
- \_\_\_\_\_ Money market accounts
- \_\_\_\_\_ Retirement accounts
- \_\_\_\_\_ Stacey's debts
- \_\_\_\_\_ Stocks
- \_\_\_\_\_ CDs

#### 3. Listening for More Detail

**Read questions 1–10. Listen to the conversation again. Choose the correct answer for each question.**

1. Who is Stacey Lloyd?
  - a. a member of the bank
  - b. a financial advisor
2. What does the financial advisor offer to do?
  - a. tell Stacey about investment options
  - b. open a new bank account for Stacey
3. What is Stacey's goal?
  - a. to one day buy a car
  - b. to one day buy a house
4. What kind of debt does Stacey have?
  - a. credit card debt
  - b. student loans
5. What should Stacey do before she begins to invest her money?
  - a. pay off her credit card debt
  - b. buy a house
6. Stacey should look for investments that will \_\_\_\_\_.
  - a. increase her money quickly
  - b. keep her money safe while it grows
7. What kind of investment can you write checks from?
  - a. a CD
  - b. a money market account
8. What does the financial advisor say about investing in stocks?
  - a. Stocks are a safe investment.
  - b. Stocks could be risky.
9. What does the financial advisor say about retirement accounts?
  - a. Stacey should think about opening one.
  - b. Stacey is too young to open one.
10. What will Stacey do with the information she learned?
  - a. She will go home and think about it.
  - b. She will open up a retirement account.