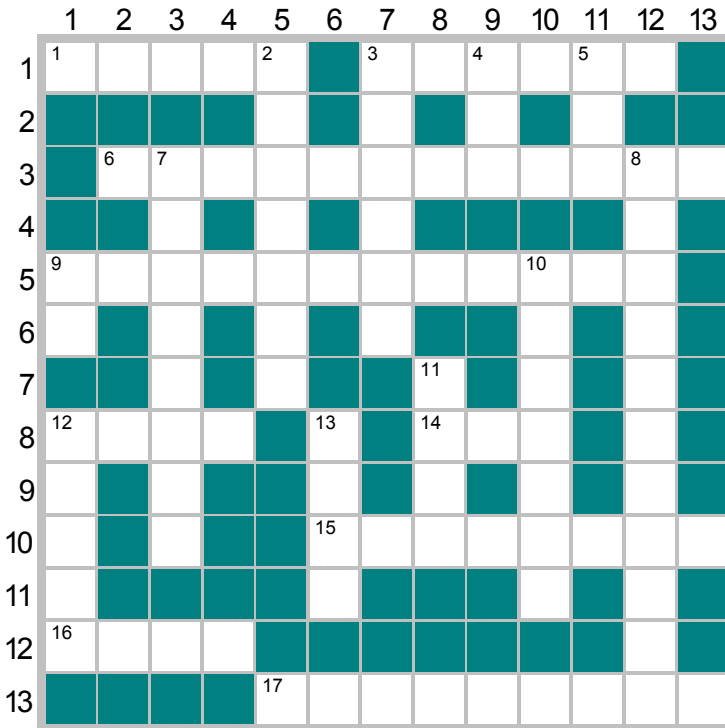


# Asset\_Management\_13x13\_2012-05-03

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## Across

- 1 That pools the savings of a number of investors who share a common financial goal. (5)
- 3 A gift of personal property under a will. The person receiving such a gift is called a legatee. (6)
- 6 The price paid for a security in the last transaction of the day on the exchanges. (7,5)
- 9 A Latin phrase and legal doctrine meaning "Let the buyer beware." (6,6)
- 12 The sales charge on an investment such as a mutual fund. (4)
- 14 The total amount of earnings of a corporation divided by the number of shares of stock outstanding. (3)

- 15 The amount by which your assets exceed the total of your liabilities. (3,5)
- 16 A qualified retirement plan that either is funded with the employers stock or with cash that is used to purchase the employers stock. (4)
- 17 A process for planning all of your next year's income and determining what you wish to do with it. (9)

## Down

- 2 The condition of dying with a valid will. (7)
- 3 A person or business that loans money to another with the expectation of being repaid the amount loaned plus a stated rate of interest. (6)

- 4 The total market value of all goods and services produced in a country calculated over a specified period of time, usually one year. (3)
- 5 An economic index which indicates the relative change in the prices of consumer goods and services. (3)
- 7 The use of borrowed money to achieve a higher rate of return on the actual amount invested. (8)
- 8 A legal entity chartered by a state and empowered to do business. (11)
- 9 A certificate issued by a bank or other financial institution that normally requires a larger deposit and pays a higher rate of interest than a regular

- savings account. (2)
- 10 A person, also called a grantor, who gives property to be placed in a trust. (7)
- 11 An amount of money owed to another, a creditor. (4)
- 12 A contract granting use or occupation of property during a specified time for a specified payment. (5)
- 13 An amount paid to use the property of another. (4)