FIN 366: INVESTMENTS
WALL STREET JOURNAL SUMMARIES INSTRUCTIONS

1.) Download the template at josephfarizo.com/template.pdf.
2.) Open the template in Adobe Acrobat Reader *before* completing the file, or answers may not be saved. Do not type answers into the form if it opens in your web browser.
3.) Complete the assignment. Save intermittently by using **FILE > SAVE AS** which will allow you to edit your answers later.
4.) To save for your final submission, choose **FILE > PRINT** then choose **Adobe PDF** as your "printer". The file name should be *LastnameFirstnameWSJ#*, where # is the number of the assignment (1, 2, 3, or 4). Upload the file as a PDF. Once you "print to PDF", you will not be able to make changes.
5.) Make sure to close your file and reopen it to check your answers were saved.
6.) Upload to josephfarizo.com/assignments.html.
7.) You will see a "Success" screen if the upload is successful.

Late or blank assignments will receive a grade of 0. Points can be deducted for incorrectly naming or submitting your form, failing to fill out the entire form, poor grammar or spelling, inaccurate information, or using a news source other than the *WSJ*. A sample is below.

Topic: 401 (k) Plans **Article Date:** 1/1/2020

Title: Capital Gains Lock-In and Governance Choices

Author(s): Will Gerken, Steve Dimmock, Zoran Ivkovic, and Scott Weisbenner

Define the topic (1 sentence):

401(k) plans are...

Summarize the article in your own words. Address any additional topics and questions this article introduces with your own research (up to 10 sentences).

In this article, the authors discuss... They bring up the concept of... Finally, they conclude with... In their discussion, they brought up three interesting topics, (1) tax deferral, (2) target retirement funds, and (3) employer contributions. Tax deferral is when...