



Researching mutual funds

With an investment plan in place, finding the right funds is the icing on the cake. Use this worksheet to compare similar funds to narrow down your choices.

Objective of these funds:

	Fund 1	Fund 2	Fund 3
Fund name			
Fund symbol			
Benchmark index			
Benchmark return over: 1 year 3 year 5 Year			
Fund return over: 1 year 3 year 5 Year			
Fund manager tenure			
Minimum investment			
Annual expense ratio			
Load? How much?			
12b-1 fee?			
Turnover rate			
Alpha			
Beta			
R-squared			