

CHAPTER OVERVIEW

9: Mutual Funds, IRAs and 401(k) Plans

Learning Objectives

- After completing this chapter, students should be able to
- Define mutual funds
- Identify advantages of mutual funds
- Identify key types (objectives) of mutual funds
- Define key terms associated with mutual funds
- Calculate the dollar cost of expenses and fees associated with mutual funds
- Compare and contrast a Traditional vs. Roth IRA/401(K)
- Identify maximum contribution to an IRA and 401(K) Plan
- Identify the tax benefits associated with IRAs and 401(K) Plans
- Identify the role of a Rollover IRA
- Differentiate between an IRA and a 401(k) Plan
- Explain the advantage of matching contributions associated with a 401(k) Plan
- Define the concept of vesting and explain its importance

[9.1: Retirement](#)

[9.2: Mutual Funds](#)

[9.3: Individual Retirement Accounts \(2021\)](#)

[9.4: 401\(k\) PLANS](#)

[9.5: Key Takeaways](#)

[9.6: Exercises](#)

[9.7: References and Attributions](#)

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