**Financial Bibliography for Investors of all Skill Levels**

**Seventeen Options to Assist in Financial Decisions**

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American Association of Individual Investors; [www.aaii.com](http://www.aaii.com)

Bogleheads, named after Vanguard founder, John Bogle, [www.bogleheads.org](http://www.bogleheads.org)

Financial Investment Regulatory Authority; [www.finra.org](http://www.finra.org)

Financial Planning newsletter; <https://www.financial-planning.com/>, available by subscription.

Internal Revenue Service; [www.irs.gov](http://www.irs.gov); <https://www.irs.gov/help/tax-scams/report-a-tax-scam-or-fraud>; <https://www.irs.gov/pub/irs-news/FS-13-03.pdf>

Stay informed on the financial planning industry by subscribing to an interesting newsletter on investing and trends: <https://www.investmentnews.com/>

*Investopedia* was founded in 1999 with the mission of helping people improve their financial outcomes. [www.investopedia.com](http://www.investopedia.com)

Morningstar Research firm, headquartered in Chicago. Their stated mission is to create great products that help investors reach their financial goals. [www.morningstar.com](http://www.morningstar.com). Much can be perused at no charge, but to access the firm’s vast database on equities and fixed-income, you’ll have to pay their fee. They also offer a 7-day free trial.

Check the website for the National Association of Insurance To thoroughly investigate an insurance annuity product, start by checking the company's credit rating and confirming the agent's license. Then, review the contract details, compare similar contracts from different companies, and consider your financial goals and risk tolerance. Additionally, consult with a financial advisor and contact your state insurance department for further information and to report any concerns. <https://content.naic.org/article/consumer-insight-insurance-fraud>. Here’s an additional snap shot from California regarding annuities: <https://www.insurance.ca.gov/0150-seniors/0100alerts/DeceptiveSales.cfm>. Regardless of which state you reside in, you can contact your state’s insurance agency to inquire about the strength and reliability of the insurer.

National Association of Personal Financial Advisors. [www.napfa.org](http://www.napfa.org). As stated on their website: For 40 years, NAPFA has been the standard bearer for Fee-Only, fiduciary financial advisors advocating for high professional and ethical standards. Working in a strict Fee-Only, fiduciary capacity, NAPFA-affiliated financial planners are committed to maintaining the highest level of competency with a client-centered focus that means aligning solely with their client’s interests.

The Securities and Exchange Commission; [www.sec.gov](http://www.sec.gov); you’ll find many articles related to investor advocacy as well as sanctions against financial planners and relevant information regarding Fiduciary Duty.

For tax insights, Ed Slott is considered a leader in educating clients. You can learn more about him on his website: <https://irahelp.com/slottreport/>. He also writes a column for Investment News.

The Wall Street Journal. [www.wsj.com](http://www.wsj.com). In addition to the daily news, this newspaper provides information for individual investors, such as scandals, sanctions, and retirement information. Their online paid subscriptions cost is approximately two dollars per week for one year.

Happy investing, ask questions, and stay optimistic!



**There are also a variety of Podcasts that listeners may find very helpful:**

**Planet Money –** sponsored on National Public Radio, on a variety of topics pertaining to investing and the economy. <https://www.npr.org/podcasts/510289/planet-money>

**The Long View**, on You Tube, featuring Christine Benz of Morningstar.

<https://www.youtube.com/playlist?list=PLdHNrgBvsSFQxs-SVvcyiYYjyPwsLYOW1>

<https://bogleheads.podbean.com/> Presented by the John C. Bogle Center for Financial Literacy.