

EXCEL PROJECT 20: Creating a Pie Chart

Objectives Practiced

- Create a chart.
- Modify a chart.

Vanessa is a financial planner who works with clients to help them achieve their desired investment goals for their retirement accounts. She uses Excel to help illustrate what percentage of investment options make up a client's account.

1. Open **EX Project 20.xlsx** from the folder containing your data files, and save it as **Investment Portfolio XXX.xlsx** (replace XXX with your initials).
2. Create a 2-D pie chart displaying the data in the range A3:B7.
3. Change the chart layout to Layout 6.
4. Change the chart title to **Contribution Allocation**.
5. Change the chart style to Style 11.
6. Resize the chart proportionally to make it approximately twice as large.
7. Move the chart so that it is located approximately in cells C2:O25.
8. Save and close the workbook, then exit Excel.

Hint

To resize a chart proportionally, press and hold the Shift key while dragging a corner handle.

Critical Thinking

Open the **Investment Portfolio XXX.xlsx** file. Experiment with changing the chart type. If there is a chart type you feel better illustrates the data, save the chart with this new type. In cell A11, wrap the text and enter a brief explanation of why you changed the type. If you did not find a better chart type, then enter an explanation in cell A11 as to why you feel the 2-D pie chart type used in the project best suits this data. Save and close the workbook.