

Personal Investing Action Planner

This form can help jump start your investment plan. Fill it out and review it with your investment adviser/broker before you invest.

1. My investment goals and objectives are:

2. Write out specific, financially measurable goals. Set specific wealth accumulation goals.

- By _____ (date), I will have accumulated \$ _____ for the specific purpose of _____.
- By _____ (date), I will have accumulated \$ _____ for the specific purpose of _____.
- By _____ (date), I will have accumulated \$ _____ for the specific purpose of _____.
- By _____ (date), I will have accumulated \$ _____ for the specific purpose of _____.

3. Note what you currently have available to invest. As of _____ (today's date), I currently have \$ _____ available for investment.

4. If you plan on using future cash flow for investment (such as deductions/direct deposit from salary or automatic investments from your checking account) describe that here:

5. I am looking at the following investment alternatives to help me reach my goals.

6. Identify the risk factors and projected returns for each alternative. This may involve talking to your broker/advisor and reading the prospectus and research materials on each investment alternative.

Projected

Investment	Risk Factors	Return
_____	_____	_____ %
_____	_____	_____ %
_____	_____	_____ %
_____	_____	_____ %
_____	_____	_____ %
_____	_____	_____ %

7. Rank the top three suitable investments, based on your tolerance for risk, the risk of the investment, and your objectives.

1. _____
2. _____
3. _____

Material provided by Michael P. Griffin.