



# HOCO CRE

## **INVESTMENT PLANNING WORKSHEET**

Planning is the most crucial step toward a successful investment outcome. A few weeks or months can make a world of a difference when it comes to the performance of your investments.

For this reason, it's necessary to evaluate your own knowledge of investment planning before shelling out your hard-earned money.

Answer the following questions to gain a better perspective of your understanding of investing:

INVESTMENT PLANNING WORKSHEET – BECOME PREPARED



Do I have a plan for the next 20-years?

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2. Have I set aside funds to reach my goals? If no, how much do I need to save in order to get the ball rolling?

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3. How will I allocate the funds to make my first investment? If I must adjust my household budget, what areas of my current expenses will have to be trimmed?

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4. Have I determined how I will invest my money? If so, what is my strategy?

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5. Am I willing to speak to an investment advisor in order to gain a professional perspective on my current strategy? What questions will I ask him to ensure we're a good fit?

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6. How do I plan to educate myself on my investment of choice before investing my hard-earned cash?

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7. Am I prepared to enter into a long-term investment? If so, do I understand that my money will likely earn a slow, but steady return?

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8. Do I have enough information to make a decision as to whether a tax-preferred or traditional investment aligns best with my goals? What information do I need?

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Do I know how to analyze the performance of my investments? What key metrics do I need to pay particular attention to?

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9. Do I have a plan B in case my first plan falls short? What is it?

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Discuss this worksheet with one of our trusted advisors today for free!

Contact our trusted advisor below:

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