

THE MONEYSENSE COMPLETE FINANCIAL PLAN KIT

WORKSHEET #8: WHICH INVESTMENTS ARE RIGHT FOR YOU

STEP 1: WHAT ARE MY INVESTMENT OBJECTIVES?

ASK YOURSELF THREE QUESTIONS:

1. WHY AM I SAVING?

(eg. House, Vacation, Retirement)

2. WHEN DO I NEED THE MONEY?

(Check one)

Within 1 Yr

2 - 5 years

5 - 10 years

10 years or more

3. WHAT AM I LOOKING FOR?

(Rank in order of priority 1, 2, or 3)

Safety

Income

Growth

STEP 2: WHAT IS MY RISK TOLERANCE?

HOW COMFORTABLE AM I WITH VOLATILITY?

(Check One)

Not Very (Low Risk)

Quite Comfortable (Medium)

Very Comfortable (High)

STEP 3: WHAT IS MY ASSET ALLOCATION?

GIVEN MY INVESTMENT OBJECTIVE AND RISK TOLERANCE, HOW MUCH DO I WANT TO INVEST IN:

Cash

_____ %

Bonds

_____ %

Stocks

_____ %

100%

STEP 4: HOW MUCH MONEY CAN I PUT TOWARDS THIS GOAL?

Total saved to date

Monthly contribution

STEP 5: WHAT IS MY PLAN OF ACTION FOR INVESTING THIS MONEY?
