

MODULE 7, FINAL WORKSHEET



Build Your Personal Investing Plan

Investing Essentials for Beginners

Key Concepts at a Glance

- **Investing Plan:** A simple written outline of your goals, timeline, and strategy.
- **Time Horizon:** The number of years you plan to keep your money invested.
- **Risk Tolerance:** How comfortable you are with market ups and downs.
- **Core Idea:** Investing becomes real when you turn knowledge into a simple plan and start.

A Simple Example

*One person keeps learning about investing... but never starts.
Another writes a simple plan and begins investing a small amount each month.
Years later, the difference isn't knowledge.
It's that one of them started.*

That's how disciplined investors operate.

Your 5-Question Investing Plan

- **Why am I investing?**
- **What is my time horizon?**
- **How much risk can I handle?**
- **How much will I invest regularly?**
- **Where will I invest?**

Take a Moment to Reflect

- Why am I investing?

- What is my investing time horizon?

- How much risk am I comfortable taking?

- How much can I invest each month?

- Which platform or account will I use to begin?

Key Takeaway

Investing success rarely comes from perfect timing.
It comes from having a plan and starting.

What Comes Next?

Now that you have your plan, the next step is simple: open your account, start investing, and stay consistent.

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