

# INVESTMENT PLANNING TEMPLATE



<b>CURRENT SITUATION</b>	What amount per month are you safely able to invest, as of today?		List all current income investments i.e. Rental properties, etc.	
	\$			
	Are you currently investing in an employer's retirement plan?			
	___ Yes ___ No ___ N/A			
	Contribution Amount	Contribution Frequency		
			List all current growth investments	
	Matching contribution offered by employer?			
	___ Yes ___ No ___ N/A			
	Define max matching employer funds ( \$ or % )			
Currently contributing max matching employer funds?				
___ Yes ___ No ___ N/A				

<b>ASSESSMENT</b>	Is there a better use of my money?	
	Does my current strategy support my retirement goals?	
	What are the sacrifices currently made due to investment contributions?	
	Am I comfortable / satisfied with current investments?	
	Are there changes that should be implemented?	
	Am I in a place to make adjustments? Define any roadblocks.	
	What further information is required to make these decisions?	
	What are my research resources?	

Rank the following INVESTMENT GOALS on a scale from 1 (most important) to 10 (least important)	
PRIORITY RANKING	Protecting assets from creditor claims
	Income tax reduction
	Minimizing principal loss
	Maximizing large short-term gain potential
	Ensuring stable / steady, if slow growth for long-term, future needs i.e. College, retirement, etc.
	Maximizing current income
	Building savings for short- to mid-term large purchases
	Maximizing estate value for heirs
	Minimizing estate taxes owed upon death
	Maximizing liquidity should funds be required quickly

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