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Investor's Strategy Checklist

A framework for individuals and families to build wealth intentionally and sustainably.

✅ 1. Set a Clear Financial Vision

- ☐ **Define your long-term financial goals (retirement, legacy, freedom)**
- ☐ **Set timeframes (5, 10, 20+ years)**
- ☐ **Identify monthly/annual surplus for investing**

✅ 2. Build a Resilient Foundation

- ☐ **Maintain 3–6 months emergency savings**
- ☐ **Eliminate high-interest consumer debt**
- ☐ **Maximize employer retirement matches (401k, IRA, etc.)**
- ☐ **Establish automated savings/investing habits**

✅ 3. Understand Core Investment Vehicles

- ☐ **Index Funds / ETFs for long-term compounding**
- ☐ **Dividend Stocks for passive income**
- ☐ **Bonds or Treasuries for risk balance**
- ☐ **Tax-advantaged accounts (Roth IRA, HSA, 529)**

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✅ **6. <u>Review + Refine Annually</u>**

- ☐ **Rebalance your portfolio as needed**

- ☐ **Adjust strategy based on income, life goals, or economy**
- ☐ Educate yourself continuously

"You work hard for your money.

It's only right that it works hard for you.

Let's put your money to work"