CHECKLIST · FINANCIAL MANAGEMENT

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Starting an Investment Portfolio

Building an investment portfolio helps grow your wealth and achieve long-term financial goals. Use this checklist to start investing confidently.



9 steps · Print-ready A4

NAME _____ START _____ TARGET DATE _____

1 Set Clear Investment Goals

Define your objectives, such as retirement, a home purchase, or wealth growth.

EXAMPLE *"Save $100,000 for retirement in 20 years."*

2 Learn Basic Investment Concepts

Understand terms like stocks, bonds, ETFs, and risk tolerance.

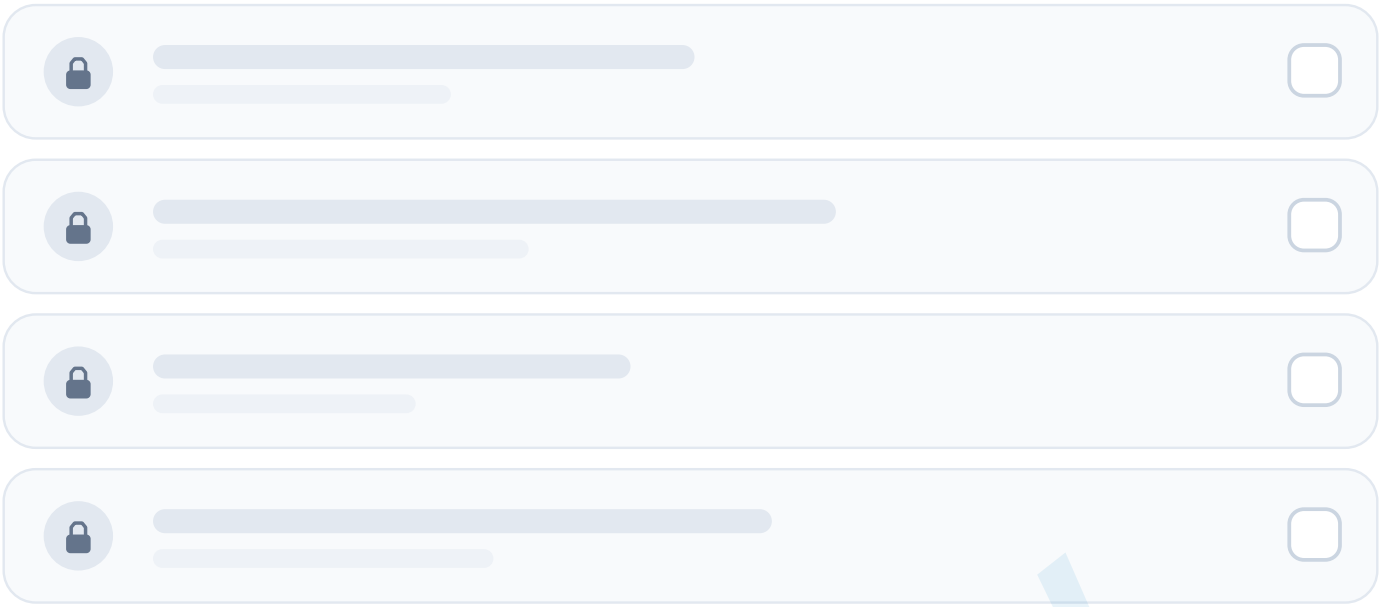
TIP *Read beginner-friendly guides or watch educational videos.*

3 Determine Your Risk Tolerance

Assess how much risk you're comfortable taking based on your age and goals.

EXAMPLE *Younger investors may opt for more stocks, while retirees may prefer bonds.*

PREVIEW



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