**INVESTMENT PLANNING TEMPLATE**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CURRENT SITUATION** | **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** | |  |

|  |  |  |
| --- | --- | --- |
| **ASSESSMENT** | **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?** |  |

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| **PRIORITY RANKING** | **Rank the following INVESTMENT GOALS on a scale from 1 (most important) to 10 (least important)** | |
|  | 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 |