

Investment Plan Worksheet

Step 1: Define Your Risk Tolerance and Investment Goals

Risk Tolerance (Low, Medium, High): _____

Short-Term Goals: _____

Long-Term Goals: _____

Step 2: List Your Current Investments and Evaluate Performance

Investment Type	Current Value	Annual Return (%)	Performance Notes

Step 3: Plan Contributions to Retirement and Taxable Accounts

Account Type	Contribution Amount	Frequency (Monthly, Annually)	Target Balance

Step 4: Regular Review and Rebalancing

Review asset allocation and compare with target allocation.

Check performance of individual investments.

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Adjust contributions or reallocations to align with financial goals.

Schedule regular reviews (quarterly or annually).