

Leave emotion out of it. Plan now, set goals, proceed with diligence.

There will be plenty of time to celebrate after the work is done. -Matt

Meticulous planning is critical before you decide to pull the trigger on your investment. Make sure you have an attack plan that's in-sync with the short and long-term goals you've set for this particular investment. Taking time to plan intelligently now will help avoid an emotionally charged plan and will eliminate problems before they begin.

1

How does this investment assist with my short-term goals?

2

How does this investment assist with my long-term goals?

3

How does this investment assist with my short AND long-term goals?

HOW MUCH IN ASSETS DO YOU WANT AT RETIREMENT?

\$ _____
(ANSWER ME)

WHAT ANNUAL RATE OF RETURN ARE YOU SEEKING FROM YOUR ASSETS AT RETIREMENT?

% _____
(ANSWER ME)

AT WHAT AGE DO YOU WANT TO RETIRE?

(ANSWER ME)



membership level:
FOUNDATION

