

GAIN CLARITY
TAKE ACTION



THIS PLANNER WILL HELP YOU TO

- 1. Work out your short-term, medium-term and longterm investment goals.
- 2. Identify the total amount of money needed for your goals for each of the terms.
- 3. Calculate the monthly amount of money you need to set aside to invest for your goals.
- 4. Find out the minimum investment returns required to achieve your goals.

BENEFITS OF THIS PLANNER

- 1. Establish how much you need to invest every month.
- 2. Determine if your investment goal time frames are realistic based on your current income and investment returns.
- 3. Provide clarity on what investments to choose based on the required rate of return and the time you have.
- 4. Provide peace of mind and clarity during the bear market if you invest for long-term goals.

REVIEW DATE:

Investment Goals	Short Term	Medium Term	Long Term	Retirement
mvestment dodis	(3 years)	(3–7 years)	(7+ years)	(Optional)
	G / cui J/	G //cais/	(/ - / ca.)	(Optional)
When do you want to spend the money? Year to spend				
Year to spend				
Total Amount Required				
Amount Invested Now				
Extra Amount Needed				
LACIGAMINODITE I VECUCU				
Monthly Investment				
Minimum Growth Rate				
Required				

SAMPLE:

Investment Goals	Short Term (3 years)	Medium Term (3–7 years)	Long Term (7+ years)	Retirement
	(3 years)	G / years)		(Optional)
			(/+ years)	(Орионат)
2-week holiday to	\$4000			
Japan	4 (000			
•				
Save for Johnny's		\$50 000		
education				
Deposit for a property		\$20 000		
in Brisbane				

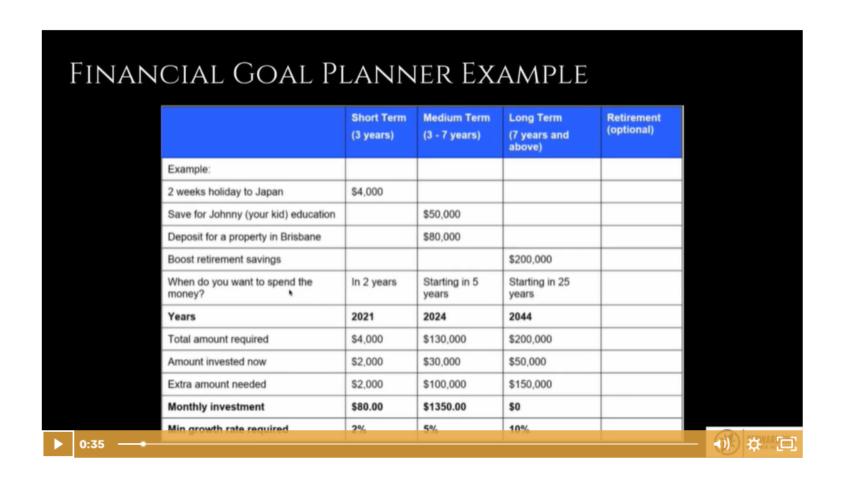
Boost Retirement Savings			\$200 000	
When do you want to	In 2 years	In 5 years	In 25 years	
spend the money?	2024	2024	2044	
Year to spend	2021	2024	2044	
Total Amount Required	\$4,000	\$130,000	\$200,000	
Amount Invested Now	\$2,000	\$30,000	\$50,000	
Annount invested ivolv	42,000	430,000	400,000	
Extra Amount Needed	\$2,000	\$100,000	\$150,000	
Monthly Investment	\$80.00	\$1350.00	\$ 0	
	•	•	_	
Minimum Growth Rate Required	2%	5%	10%	

VIDEO INSTRUCTION

CLICK HERE

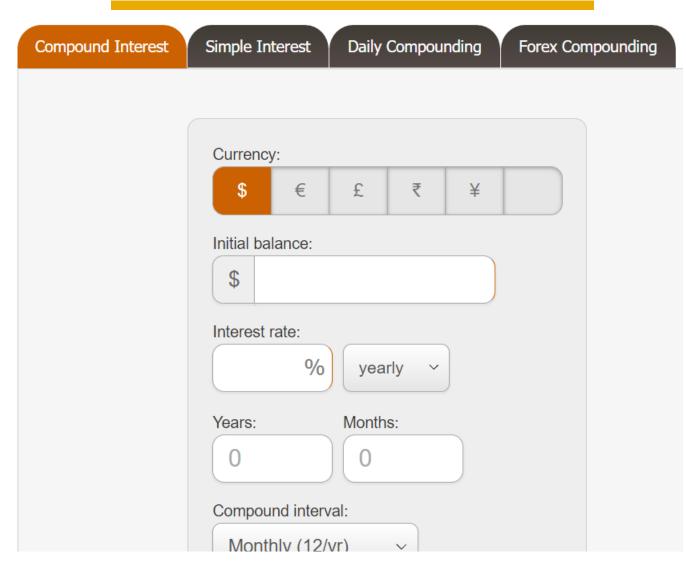
How to set your investment goals

How To Be A Smart Investor / The golden rules of investing



USE THE COMPOUND INTEREST CALCULATOR TO WORK OUT THE MONTHLY INVESTMENT AND THE MIN GROWTH RATE REQUIRED

CLICK HERE



HOW WOULD YOU FEEL IF YOU WOKE UP TOMORROW AND FOUND YOUR INVESTMENT BALANCE HAD DROPPED 20%?
EG: \$100,000 DOWN TO \$80,000?

RECOMMENDED INVESTMENT GRID

CASH **RELAXED BALANCED GROWTH CASH CONSERVATIVE** A BIT WORRIED **BALANCED LOSING SLEEP CASH CONSERVATIVE** CONSERVATIVE **4 - 6 YEARS** 1 - 3 YEARS **7 YEARS +** TIME FRAME

THIS PLANNER IS TAKEN OUT OF THE LESSON

"HOW TO BE A SMART INVESTOR" BY STEWARDSHIP FINANCE ACADEMY.

TO VIEW THE FULL LESSON

CLICK HERE



