



STEWARDSHIP FINANCE ACADEMY

INVESTMENT GOALS PLANNER

GAIN CLARITY
TAKE ACTION



THIS PLANNER WILL HELP YOU TO

1. Work out your short-term, medium-term and long-term 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.



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REVIEW DATE:

Investment Goals	Short Term (3 years)	Medium Term (3 – 7 years)	Long Term (7+ years)	Retirement (Optional)
When do you want to spend the money?				
Year to spend				
Total Amount Required				
Amount Invested Now				
Extra Amount Needed				
Monthly Investment				
Minimum Growth Rate Required				

REVIEW THIS PLANNER ONCE A YEAR; OR WHEN YOU ENCOUNTER
MAJOR FINANCIAL CHANGES.



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SAMPLE:

Investment Goals	Short Term (3 years)	Medium Term (3 – 7 years)	Long Term (7+ years)	Retirement (Optional)
2-week holiday to Japan	\$4000			
Save for Johnny's education		\$50 000		
Deposit for a property in Brisbane		\$80 000		
Boost Retirement Savings			\$200 000	
When do you want to spend the money?	In 2 years	In 5 years	In 25 years	
Year to spend	2021	2024	2044	
Total Amount Required	\$4,000	\$130,000	\$200,000	
Amount Invested Now	\$2,000	\$30,000	\$50,000	
Extra Amount Needed	\$2,000	\$100,000	\$150,000	
Monthly Investment	\$80.00	\$1350.00	\$0	
Minimum Growth Rate Required	2%	5%	10%	



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VIDEO INSTRUCTION

[CLICK HERE](#)

How to set your investment goals

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

FINANCIAL GOAL PLANNER EXAMPLE

	Short Term (3 years)	Medium Term (3 - 7 years)	Long Term (7 years and above)	Retirement (optional)
Example:				
2 weeks holiday to Japan	\$4,000			
Save for Johnny (your kid) education		\$50,000		
Deposit for a property in Brisbane		\$80,000		
Boost retirement savings			\$200,000	
When do you want to spend the money?	In 2 years	Starting in 5 years	Starting in 25 years	
Years	2021	2024	2044	
Total amount required	\$4,000	\$130,000	\$200,000	
Amount invested now	\$2,000	\$30,000	\$50,000	
Extra amount needed	\$2,000	\$100,000	\$150,000	
Monthly investment	\$80.00	\$1350.00	\$0	
Min growth rate required	2%	5%	10%	

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

[CLICK HERE](#)

Compound Interest

Simple Interest

Daily Compounding

Forex Compounding

Currency:

\$

€

£

₹

¥

Initial balance:

\$

Interest rate:

%

yearly

▼

Years:

0

Months:

0

Compound interval:

Monthly (12/vr)

▼



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**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

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

**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





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