

INVESTMENT PLAN

Date _____

Heads of Household

Name _____ Age _____ Name _____ Age _____

Minor Children

Name _____ Age _____ Name _____ Age _____

Name _____ Age _____ Name _____ Age _____

Name _____ Age _____ Name _____ Age _____

Annual Household Income

Source	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

Current Investment Account Balances

Retirement Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Retirement	\$ _____

College Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total College	\$ _____

Other Investment Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Other	\$ _____

Total Amount Invested \$ _____

Monthly Contributions to Investment Accounts

Write these numbers in pencil at first. A little later on this form, you'll be encouraged to run some numbers with a retirement-planning calculator (and a college funding calculator, if applicable), so you may end up adjusting these figures.

Retirement Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Retirement	\$ _____

College Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total College	\$ _____

Other Investment Account(s)	Balance
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Total Other	\$ _____

Total Amount Invested \$ _____

Investment Goals

Write down what year you plan to retire. If you have kids and are investing for their future college costs, write down what year(s) they will likely begin college, what type of school you'd like to help them pay for (state or private), and what percentage of the cost you'd like to be able to cover. You don't have to get specific with dollar amounts for your goals yet. A little later on this form, you'll be encouraged to do that.

Retirement: _____

College: _____

Other: _____

Optimal Asset Allocation

Use the asset allocation process at www.smind.co/multiply to determine your optimal stock/bond allocations. This is for your retirement portfolio and should help guide your investment decisions.

Stocks _____%

Bonds _____%

Total **100%**

Run Some Numbers

After using one or more of the retirement-planning calculators recommended at www.smind.co/multiply (and the recommended college-funding calculator, if applicable), fill in the blanks below and then make any needed adjustments in the Monthly Contributions section of this plan.

How much are you trying to accumulate by retirement? \$_____ by 20____ (year)

How much do you need to invest each month to hit that target? \$_____

How much are you trying to accumulate for college (child 1) \$_____ by 20_____

How much do you need to invest each month to hit that target? \$_____

How much are you trying to accumulate for college (child 2) \$_____ by 20_____
How much do you need to invest each month to hit that target? \$_____

How much are you trying to accumulate for college (child 3) \$_____ by 20_____
How much do you need to invest each month to hit that target? \$_____

How much are you trying to accumulate for college (child 4) \$_____ by 20_____
How much do you need to invest each month to hit that target? \$_____

Investments

Describe the overall investment approach (DIY, DIY with help, Advisor-managed, Other) and strategy you plan to use in managing your investments.

Retirement: _____

College: _____

Other: _____

Market Events

Describe how you will respond to significant changes in the stock market. (There's an example of a Market Events statement at www.smind.co/multiply.)
