



Best investment Gurus

30 Day Bucket List Investing Challenge

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WORKSHEET Day 3

WEEK 1 - DAY 3 "The Lazy Investor's Way to Set Goals"

Day 3 Your Task/s:

Again, do as much reading and planning that you can cope with. I continually update BiG with the best information, tools and gurus around.

1. My current financial situation (see [Day 2](#) and Worksheet Day 2) is:

2. Some of my financial goals are:

Daily

Weekly

Monthly

Investing timeframe

a. Short term (1-3 years)

b. Medium term (3-5yrs)

c. Long term (5 yrs or more)

3. My investing timeframe realistic given my circumstances

4. Risk is:

5. My risk tolerance is:

6. My investment strategy is:

7. Resources (\$, time, energy, motivation)

I have:

I'll need:

8. My investing budget is \$

9. Go to [BiG's Wealth Creation Strategies and Topics](#) and open MoneySmart's *Meeting with a financial adviser* and list:

- What you own - your home, savings, super, car, shares and other investments
- What you owe - debts including mortgages, loans and outstanding credit card balances
- Income and expenses
- What insurance you have and for how much
- Whether you have an up-to-date will

And *prioritise* - do you want to:

- Pay off your mortgage sooner?
- Build wealth and save for retirement?
- Save for your children's education?
- Make the most of an inheritance?
- Anything else?