



Your Personal Investment Statement

Fill in the blanks to finalize your investment goals and plans.

1. I can best describe myself as a _____ investor (conservative, moderate, or aggressive).
2. I feel most comfortable investing in (e.g., CDs, stocks, mutual funds) _____, _____, and _____.
3. Possible alternative investments might be (e.g., real estate) _____.
4. I feel I will be able to get a real (after-inflation) return of _____% from my investments.
5. Within the next month I will do the following to learn more about investing:

6. Within the next year I will do the following to educate myself about investing:

7. By the year _____, I wish to have \$_____ invested so I can

8. By the time I plan to retire at age _____ in _____ years, I want to have accumulated \$_____ in assets.
9. I will accomplish these goals by: _____

10. The following circumstances might make me change my goals: _____

Adapted with permission from: Dahl, B., *A Working Woman's Guide to Financial Security*. Urbana, Ill.: University of Illinois Cooperative Extension. ©Board of Trustees of the University of Illinois.