

# INVESTMENT PLAN

The key to successful investing is to have a clear plan on what it is you are trying to achieve through your investment/s. It's not possible to identify the best given strategy for you unless you have a defined end goal. To help you create your own plan complete the questions below.

## Summarise your primary objective for investing?

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How many homes? _____	Supplementary income? _____
Do you own outright? _____	Ongoing cashflow or periodical gains? _____
Family home or investment properties? _____	Low risk vs High risk? _____

## Understanding your investment goals

Define what risk is acceptable? _____	What is a mid term goal? _____
Define what risk is Unacceptable? _____	What is a long term goal? _____
What short term goal you would like to achieve? _____	Low risk vs High risk? _____

## Understanding the quadrant

INCOME		EXPENSES	

  

ASSETS		LIABILITIES	

Growth:

Cashflow properties:

Combination of both: