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Investment strategy plan



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I N V E S T M E N T P L A N

strategy guide

Date · ____ **Investment horizon**: ____ years **Goal**: ____

Risk tolerance · Conservative ☐ Moderate ☐ Aggressive ☐

Asset allocation · Global equities: ____% Bonds: ____% Cash: ____% Other: ____%

Stocks & Shares ISA · Provider: ____ Fund: ____ Monthly: £____
Balance: £____

SIPP/pension · Provider: ____ Fund: ____ Monthly: £____ Balance: £____

Emergency fund satisfied first · ☐ Amount: £____

Annual review date · ____ Rebalance if more than 5% off target: ☐

T H E B E S T I N V E S T M E N T P L A N I S T H E
S I M P L E S T O N E Y O U ' L L A C T U A L L Y S T I C K
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