

Enjoy the journey, and celebrate the destination!

WHAT PLATFORMS ARE YOU USING OR CONSIDERING USING AND WHY?

HOW MUCH HAVE YOU INVESTED, WANT TO INVEST AND HOW OFTEN?

**WHAT IS YOUR INVESTMENT GOAL? SHORTTERM OR LONGTERM? EG
BUYING A HOUSE OR SAVING FOR RETIREMENT?**

I"Success is not the key to happiness. Happiness is the key to success. If you love what you are doing, you will be successful." — Albert Schweitzer

WHAT IS YOUR RISK APPETITE? ARE YOU RISK-AVERSE, RISK-SEEKING OR SOMEWHERE IN THE MIDDLE?

WHAT DO YOU WANT TO INVEST IN? EQUITY/SHARES OR MAYBE GOLD?

WHAT IS YOUR DIVERSIFICATION STRATEGY? ARE YOU GOING TO INVEST IN FEW COUNTRIES OR THE WHOLE WORLD ETF? DO YOU PREFER CERTAIN INDUSTRIES?

MY RESEARCH

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								COUNTRY/ INDUSTRY
								EXPENSE RATIO
								FUND SIZE
								RISK
								NOTES

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