Compass Propserity LLC

GET YOUR INVESTMENTS GOING!

At Compass Prosperity, I walk clients through setting up their investment accounts. After the accounts are open and you've chosen investments that you're comfortable with, we discuss how to stay invested for long term success.

Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Choose a brokerage	**Open an account**	**Fund the account**	**Choose the investments**	**Start recurring deposits**	**Stay the course!**
Brokers are for investments, banks are more for checking, savings, loans etc.	Choose the account type (brokerage, retirement, college savings), and provide your information	Put money in the account by check or by connecting your bank account	Experts recommend target date funds, or low cost index funds	Invest the same amount every week or month. “Dollar Cost Averaging”	Don’t let the market swings or a friend’s get-rich-quick story distract you