



Ledger's Beginner Investment Plan Template

(Presented by Parker Wealth Advisory)

1) Define Your Goals

- Short-term (1–3 years): _____
- Medium-term (3–7 years): _____
- Long-term (7+ years): _____

💡 *Ledger's Note: "An owl always sees the whole forest — not just the branch you're on."*

2) Know Your Risk Comfort

Circle or check one: ☐ Conservative ☐ Moderate ☐ Aggressive

Why I chose this: _____

💡 *Ledger's Note: "Every owl has a different wingspan — know yours before you leap."*

3) Build Your Foundation

- Emergency Fund Target: \$_____ (3–6 months of expenses)
- High-Interest Debt Paid Off? ☐ Yes ☐ No
- Monthly Contribution I Can Commit: \$_____

4) Choose Your Investment Mix

(Adjust based on your risk comfort)

- Stocks/ETFs: _____ %
- Bonds: _____ %
- Cash/Other: _____ %

💡 *Ledger's Note: "Balance your nest — too many eggs in one basket can crack your plan."*

5) Automate & Track

- Automatic Contribution Set Up? ☐ Yes ☐ No
- Rebalance Date: _____
- Tracking Tool/App: _____

6) Review & Adjust

- Next Review Date: _____
- Life Changes to Consider: _____

💡 *Ledger's Note: "Even the wisest owl checks the skies before flying again."*

✅ Final Step
Download complete — now you've got your first investment roadmap. Keep it simple, stay consistent, and let your wealth grow over time.

If you would like a free consultation to dive deeper into your investment plan, contact us!!

Educational only — not investment, legal, or tax advice. For personal guidance, talk to a fiduciary advisor.

www.parkerwealthadvisory.com

info@parkerwealthadvisory.com