



Checklist for Getting Started

- Establish emergency fund and eliminate high-interest debt *(Parts 1 & 2)*
- Build a foundation of knowledge about index funds *(Parts 3, 4, 5 & 6)*
- Review the three suggested types of index funds *(Part 7)*
- Decide on mutual funds vs. ETFs *(Part 8)*
- Determine overall asset allocation *(Part 9)*
 - Asset Allocation: _____ % Stocks / _____ % Bonds
- Figure in international stocks *(Part 10)*
 - Asset Allocation: ___% U.S. Stocks / ___% International Stocks / ___% Bonds
- Research fund options *(Part 11)*
- Plan out fund purchases ahead of time *(Part 12)*
- Call up brokerage firms and arrange to self-manage *(Part 13)*
- Make your fund purchases *(Part 13)*
- Determine rebalance plan *(Part 14)*
 - By time: every _____ months, or
 - By variance: when exceeding _____ % variance from target asset allocation
- Set up portfolio tracking spreadsheet *(Part 15)*
- Stay the course! *(Part 16)*
- (Optional) Further reading *(Part 16)*