FIGHT FIRE WITH F.I.R.E.

Firefighter Investing, Retirement & Education

Investing Guide Checklist

- [ ] 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*