



Investment Plan Worksheet (Sector Allocation)

Name: _____ Date: _____ Initial or (planned) Investment: _____

Step 1. In the **Allocation** column, enter the allocation percentage that matches your age and stage. Based on your initial investment, you can also calculate the dollar amount this translates to.

- E.g., \$10,000 x 25% = \$2,500.

Step 2. Under the applicable **Initial Investment** column, for each sector, research and make note of some companies of interest. In Lesson 4, we'll go over how to compare companies so you can decide what to buy.

Sector	Allocation	Initial Investment Up to \$10,000	Initial Investment \$10,000-50,000	Initial Investment \$50,000-100,000	Initial Investment \$100,000+
Finance	_____% \$_____	1 company _____	2 companies _____ _____	3 companies _____ _____ _____	4 companies _____ _____ _____ _____
Utilities	_____% \$_____	1 company _____	2 companies _____ _____	3 companies _____ _____ _____	4 companies _____ _____ _____ _____
Consumer Defensible	_____% \$_____	1 company _____	2 companies _____ _____	3 companies _____ _____ _____	4 companies _____ _____ _____ _____
Telecom	_____% \$_____	1 company _____	2 companies _____ _____	2 companies _____ _____	2 companies _____ _____