

INVESTMENT STRATEGIES CHECKLIST FOR BEGINNERS

Your Step-by-Step Guide to Financial Freedom



Step 1: Build Your Financial Foundation

- ☐ Create a monthly budget
- ☐ Build an emergency fund (3–6 months of expenses)
- ☐ Pay off high-interest debt (credit cards, payday loans)
- ☐ Set clear financial goals (short-, mid-, long-term)

Step 2: Start Investing with Low Risk

- ☐ Open a brokerage account (Vanguard, Fidelity, Charles Schwab)
- ☐ Invest in low-cost index funds or ETFs (e.g., S&P 500)
- ☐ Set up automatic monthly contributions
- ☐ Monitor performance quarterly

Step 3: Explore Real Estate Opportunities

- ☐ Research real estate markets in your local area
- ☐ Consider buying a rental property or house hacking
- ☐ Look into REITs for passive real estate investing
- ☐ Research partnerships in local pest control or service-based businesses



CLICK HERE:

Let me Help you, to find your financial FREEDOM.

INVESTMENT STRATEGIES CHECKLIST FOR BEGINNERS

Your Step-by-Step Guide to Financial Freedom



Step 4: Maximize Retirement Accounts

- ☐ Contribute to your 401(k) (at least enough to get the employer match)
- ☐ Open a Roth IRA (especially if you're self-employed)
- ☐ Review fees and allocations annually

Step 5: Keep Learning and Adjusting

- ☐ Follow a personal finance podcast (like the Money Flow Genie Podcast)
- ☐ Read blogs or books on investing and financial growth
- ☐ Meet with a financial coach or mentor quarterly
- ☐ Revisit and revise your investment plan every 6–12 months

BONUS ACTIONS

- ☐ [Schedule a strategy session with Candice](#)
- ☐ [Follow on Facebook](#) for updates and tips
- ☐ [Watch the latest episode](#) on YouTube



CLICK HERE:

Let me Help you, to find your financial FREEDOM.



Learn More

www.moneyflowgenie.com