

DIY Financial Goals

Use this DIY Financial Goals as a tool to help think about your money goals. This isn't a comprehensive plan -- and it's definitely **no substitute for a financial plan provided by a professional adviser**.

My Financial Goals:

My Goal	Why Is It Important To Me?	When Will I Achieve It?

Hint: Copy your goals into your calendar and set a reminder to go off each month!

My Checklist:

✓ *I have a money or investing buddy.*

✓ *I'm prepared to understand how investing works.*

✓ *I have paper traded or learned enough to start*

✓ *I have taken Rask Finance's free shares courses*

✓ *I'm free of nasty debts and in control of my budget*

Example Trading Journal

Date: 13/10/20XX

What I did:

Last week, I bought shares in company X and they fell 25% and I sold out. Grrr... But then guess what happened?

This morning, another company announced they would takeover company X and the shares (which I sold) jumped 30%!

I'm just lucky I didn't put all of my money into the company!

What I learned:

I know investing is risky and I need to keep learning, but this was a reality check.

I need to do my homework and remember that shares are a long-term thing. I can't be so impatient.

And I'm not going to get everything right so I need to take it slow, no matter how good I think I am!

HINT: Use a weekly calendar reminder or smartphone to create a trading journal.

Next Steps

Things To Do Next:

- ✓ I've finished the full Rask Finance investing series. [Click here.](#)

- ✓ I've committed 20mins per day a month to reading, listening and watching finance stuff for 30 days

- ✓ I have spoken to others (e.g. my partner, friends, family) about my goals

- ✓ I subscribed to free blogs & newsletters (plug: Rask's free [newsletter](#) & [Podcast](#))

- ✓ I've got a professional opinion on investing by speaking to my accountant and financial adviser.

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