



**ETF INVESTING**  
**WORKSHEET**

*For before you start  
investing*

# ETF INVESTING WORKSHEET

Research and respond to the following questions before investing in an ETF.

## WHAT DOES THE ETF ACTUALLY INVEST IN?

(Note: don't just take their word for it, look inside the portfolio using the ETF provider's website)

## HOW DOES THE ETF COMPARE TO PEERS?

(e.g. what are two/three similar ETFs and how do they compare for long-term returns, low fees and tight spreads)?

## IS THE ETF ISSUER ONE OF THE BIG SIX ETF PROVIDERS?

## IS THE ETF LOCALLY DOMICILED FOR TAX RETURNS?

Search the Best ETFs website for your ETF and similar ETFs.

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Research and respond to the following questions before investing in an ETF.

**HOW DOES THE ETF FIT INTO MY STRATEGY? (I.E. IS IT A TACTICAL/GROWTH ETF, OR A CORE/BOTTOM-DRAWER ETF?).**

Describe how the ETF fits in with your strategy, keeping in mind you should be prepared to own the ETF for a very long time.

**LOOK AT A LONG-TERM SHARE PRICE CHART FOR YOUR ETF**

(e.g. on the Best ETF website), study the biggest falls that ETF has experienced.

**NOW ANSWER THIS QUESTION:**

"When the stock market crashes or falls a long way (e.g. every 2-3 years), I will keep my cool by remembering to..."

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My notes





Have you subscribed to The Australian Investors Podcast and The Australian Finance Podcast, and bookmarked the Rask Media website for daily market updates?

## GENERAL ADVICE WARNING

The information IN this WORKBOOK is general financial advice only. That means, the advice does not take into account your objectives, financial situation or needs. Because of that, you should consider if the advice is appropriate to you and your needs, before acting on the information. In addition, you should obtain and read the product disclosure statement (PDS) before making a decision to acquire a financial product. If you don't know what your needs are, you should consult a trusted and licensed financial adviser who can provide you with personal financial product advice. Please read our Terms & Conditions and Financial Services Guide before using THIS WORKBOOK.