



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)

1

HOW DOES THE ETF COMPARE TO PEERS?

(eg. 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 <u>Best ETFs</u> website for your ETF and similar ETFs.



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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.

1

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

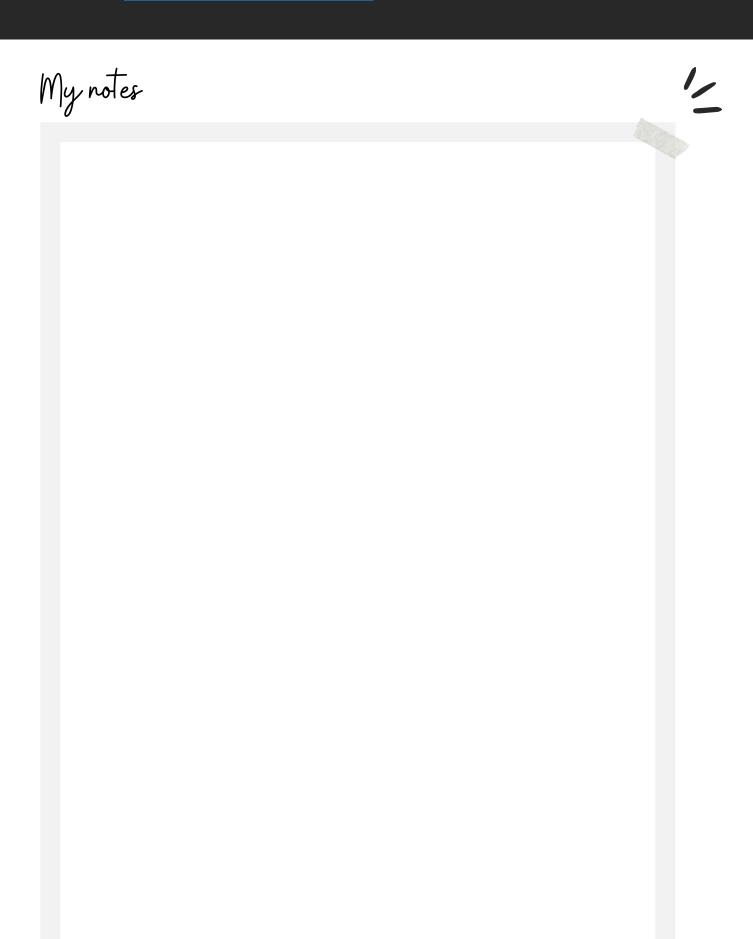
(e.g. on the <u>Best ETF website</u>), study the biggest falls that ETF has experienced.

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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GENERAL ADVICE WARNING

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