Making Investing Make Sense

Keep this open during the workshop. We'll fill it in together. Rough figures are fine, and nothing here needs to be perfect.

Name _____ Date _____

1 Everything you hold, on one page

List every ISA, pension, investing app and savings pot, including old workplace pensions. Leave the last column blank for now. We'll fill it in during Part 2.

What it is	Who it's with	Roughly how much	What is it for? (one sentence)	Its job
e.g. Stocks & Shares ISA	e.g. Trading 212	£		F / G / O
e.g. Workplace pension		£		F / G / O
e.g. Old pension (previous job)		£		F / G / O
e.g. Savings / cash		£		F / G / O
		£		F / G / O
		£		F / G / O
		£		F / G / O
		£		F / G / O
		£		F / G / O
		£		F / G / O

Roughly, in total: £ _____

Can't say what something is for in one sentence? Put a star next to it. Those are the ones we'll look at first.

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2 The three jobs your capital can do

Go back to Part 1 and give everything a job: F, G or O. Then write what sits in each one below.

Foundation

The steady part. It lets you stay calm when markets drop.

☐ Covered ☐ Thin ☐ Missing

Growth

What you hold for years and let grow, each with a clear reason.

☐ Covered ☐ Thin ☐ Missing

Opportunity

A small, limited slice for big trends, kept on purpose.

☐ Covered ☐ Thin ☐ Missing

3 Are any two doing the same job?

Look at the biggest companies inside each fund. If two funds hold mostly the same names, write them here.

These two look alike:

What I'll check:

4 Your gap, in one sentence

Which job is thin or missing, and what's sitting in the wrong place?

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5 What your capital is for

I'd like to stop working around age _____ , which is in about _____ years.

I'm also investing for _____

When I stop working, I want my capital to let me _____

6 The one question to ask before you put another pound anywhere

Write it down when Mo shares it on the night.

7 Your next move, this month

This month, I will _____

By (date) _____

One move is enough. Small and done beats big and someday.

8 Questions for Mo

Mo stays on for at least 30 minutes after the workshop to answer them. Or email mo@confidentmoneymoves.com

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