

Investment Policy Statement

Name:	Date:
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Investing Goals & Objectives

Financial Goal & Objective	Amount	Time to Goal	Priority

Notes:

Current Investments

Account Type	Pre or Post-Tax	Held At	Allocation	Current Balance

Investing Strategy

Asset Allocation

Preferred Asset Allocation: (i.e., stock, bond, cash %)	
Change When: (i.e., 1-yr pre-retirement)	

Preferred Investments

Preferred Investments: (i.e., index funds, real estate, bond funds, etc.)	

Investing Strategy	
Investment Selection Process	
List how you'll decide which investments to buy and hold and which ones to avoid and sell.	

Monitoring Investments	
What You'll Monitor:	
When:	
Rebalancing Criteria:	

Investment Asset Class	Target Allocation %	Acceptable Range
Ex. Stocks/Equities	80%	75 – 84%

ISP Change Criteria