

INVESTMENT

STRATEGIES *to grow
your*

INCOME

Planning is the most crucial step towards achieving any objective, and dealing with the financial challenges of growing your investment income is no different. Answering the following questions will help you along the path to augmenting your income with investments.

1. How much investment income do I need? When?

2. Do I have a budget? What are my expenses? Could I be investing more?

3. What is the level of risk I'm willing to assume?

4. What investing strategy makes sense for me - variable, predictable, or guaranteed? Why?

5. Do I have the level of expertise I need to be successful? What else do I need to learn?

6. Am I familiar with the different types of income investments? Which ones peak my interest?

7. Should I take advantage of professional help and spread my risk with mutual funds? Or do I enjoy the challenge and control of investing in individual instruments?

Which strategy do I feel will benefit me most at this time? Why?
