📈 MONEYONLINERS

Investment Tracker Workbook

Build, Track & Review Your Investment Portfolio with Confidence

MoneyOnliners Learning Resources

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Category
📈 Investment Planning & Tracking Workbook

Companion Academy
Investing Academy

Website

www.moneyonliners.com

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Welcome

Investing is about building wealth over time through informed decisions, patience, and consistent review.

This workbook helps you organize your investment journey by setting goals, recording investments, monitoring performance, reviewing your decisions, and planning for the future.

It is designed as an educational planning and tracking tool. It does not provide personalized investment advice or recommend specific securities.

Learning Outcomes

By completing this workbook you will:

✅ Clarify your investment goals.

✅ Assess your financial readiness to invest.

✅ Build a diversified portfolio plan.

✅ Track purchases and performance.

✅ Review investment decisions regularly.

✅ Create a long-term investing habit.

Before You Begin

Investment Readiness Checklist

☐ I have a monthly budget.

☐ I understand my financial goals.

☐ I have considered building an emergency fund.

☐ I understand that investments can increase or decrease in value.

☐ I will review my portfolio regularly rather than reacting emotionally to short-term market movements.

My Investment Goal

Why do I want to invest?

☐ Retirement

☐ Financial Independence

☐ Children's Education

☐ Home Purchase

☐ Wealth Building

☐ Passive Income

☐ Other

Target Investment Period

☐ Less than 3 years

☐ 3–5 years

☐ 5–10 years

☐ More than 10 years

My Investment Vision

Imagine yourself 10 years from now.

What financial freedom would investing help you achieve?

Financial Foundation Check

Before investing, review your financial position.

Area	Status
Monthly Budget	☐ Complete
Emergency Fund	☐ Complete
Debt Under Control	☐ Complete
Insurance Reviewed	☐ Complete
Regular Savings Habit	☐ Complete

Reflection

Which area should I strengthen before increasing my investments?

Mini Case Study

Michael's Story

Michael wanted to invest immediately after hearing about a popular investment opportunity. Before committing money, he reviewed his budget, built an emergency fund, and defined his long-term goals. By investing consistently according to his plan rather than reacting to short-term market news, he became more confident in managing his portfolio.

Key Lesson: Preparation and consistency are often more valuable than reacting to short-term excitement.

Investment Goals Planner

Goal	Target Amount	Target Date	Priority
Retirement	_____	_____	High
Education	_____	_____	Medium
Home	_____	_____	High
Other	_____	_____	_____

Risk Profile Assessment

How comfortable are you with investment risk?

☐ Prefer stability over growth

☐ Comfortable with moderate fluctuations

☐ Comfortable with higher risk for potential long-term growth

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Reflection

Why did you choose this option?

Portfolio Allocation Planner

Record your intended allocation.

Asset Type	Planned %	Actual %
Cash	_____	_____
Bonds	_____	_____
Stocks / Equities	_____	_____
Property / Real Estate	_____	_____
Other Investments	_____	_____

Investment Research Worksheet

Before making an investment, ask yourself:

What do I understand about this investment?

What are the potential risks?

How does it fit my long-term goals?

Investment Purchase Log

Date	Investment	Amount	Reason for Investing
_____	_____	_____	_____
_____	_____	_____	_____

Dividend & Income Tracker

Date	Investment	Income Received	Reinvested?
_____	_____	_____	☐ Yes ☐ No
_____	_____	_____	☐ Yes ☐ No

Portfolio Performance Dashboard

Month	Portfolio Value	Contributions	Notes
January	_____	_____	_____
February	_____	_____	_____
March	_____	_____	_____
April	_____	_____	_____

Investment Review Journal

What worked well?

What surprised me?

What have I learned?

Rebalancing Planner

Review your portfolio periodically.

Asset Type	Target %	Current %	Adjustment Needed
Cash	_____	_____	_____

Asset Type	Target %	Current %	Adjustment Needed
Stocks	______	______	______
Bonds	______	______	______
Property	______	______	______

Annual Investment Roadmap

Quarter 1

Review goals and contributions.

Quarter 2

Study portfolio performance.

Quarter 3

Review diversification.

Quarter 4

Evaluate long-term progress and update goals.

Investment Milestone Tracker

Celebrate progress as you build your portfolio.

☐ First investment made

☐ First quarterly review completed

☐ First year of consistent investing

☐ Portfolio reached first target

☐ Long-term investment plan updated

Final Reflection

Looking back on this workbook:

What investing habit improved the most?

What will I continue doing?

What will I improve next year?

Completion Checklist

- [x] Defined my investment goals
- [x] Assessed my financial readiness
- [x] Planned my portfolio allocation
- [x] Recorded my investments
- [x] Reviewed my progress
- [x] Updated my long-term plan

Certificate of Completion

Congratulations!

You have completed the MoneyOnliners Investment Tracker Workbook.

You now have a structured system for planning, tracking, and reviewing your investments. Continue using this workbook to monitor your progress, revisit your goals, and make thoughtful, informed decisions as your financial journey evolves.

My Commitment

I commit to investing responsibly, reviewing my portfolio regularly, continuing my financial education, and making decisions based on my long-term goals rather than short-term emotions.

Signature: ______________________

Date: __________________________