

My written plan

Version 2.0 (fillable)

Filled out on

Next review on

1. My goals

Goal	Amount	Year	Investment type
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2. My allocation

Emergency fund in a savings account (euros)

Volatile asset share (%)

Safe asset share (%)

Allowed deviation before I rebalance (percentage points)

3. My savings rate

Monthly (euros)

Executed on (day of month), shortly after payday

Increase once a year, in the month of

4. Rebalancing

Schedule: once a year, in the month of

Additionally if a position deviates by more than (percentage points)

Implemented preferably through new contributions, not sales.

5. What I explicitly don't do

No trading with borrowed money

No leveraged products

No purchase without a written reason

No reacting to news on the same day

Other

6. My sentence for the crisis moment

Write here what your future self should read when everything's falling. Word it now, while things are calm.

7. When I change this plan

I change it when my life circumstances, my income, or my time horizon change.

I don't change it because of market performance.

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