

Assignments

Financial Plan Assignments

Continue to work on your Investment Plan. As you do, select your portfolio rebalancing method and include this in Section IV.B. Generally, the easiest method of rebalancing is periodic-based rebalancing.

Second, I encourage you to use the new money/donations addendum to minimize market impact, transaction costs, and taxes on your portfolio.

Third, determine how often you will monitor and report on your portfolio and include that information in Section IV.A.

Finally, determine how you will communicate the results of the portfolio performance to everyone who is affected by the portfolio's performance. These are your accountability partners.

Once you have completed your Investment Plan, review it and make sure it is consistent with your vision, goals, plans and strategies. It is a challenging Plan to put together, but its dividends are more than money.