My one-page investment plan

Write the plan before reacting to a price move. Keep this sheet with the evidence behind your decisions. Your entries stay in the copy you save.

Goal and what this money is intended to fund

Time horizon and money I may need sooner

Cash reserve and foreseeable spending needs

Allocation boundaries and concentration limits

Reason for the exposure and a credible counterargument

Changes in circumstances or evidence that would trigger a review

Next review date and documents to check

A review is a chance to reassess, not an automatic instruction to trade. Account and tax rules depend on jurisdiction. Plan only with information you have checked.