

Simple Wealth Plan Setup Sheet (1-Page)

Purpose: Turn the whole book into one clear, calm plan you can run for years.

Core Portfolio Choice

Broad Stock ETF:	_____
Bond/Stable Asset ETF:	_____
Optional Diversifier:	_____

Target Asset Mix

Stocks %:	_____
Bonds/Stabilizers %:	_____
Diversifiers %:	_____

Baseline Contribution Rate

Monthly \$ or %:	_____
Minimum Viable Contribution (bad months):	_____

Contribution Schedule

Per Paycheck <input type="checkbox"/> Monthly <input type="checkbox"/>	_____
Contribution Date(s):	_____

Automation Checklist

Transfers set up <input type="checkbox"/>	_____
Auto-invest purchases set <input type="checkbox"/>	_____
Downshift option defined <input type="checkbox"/>	_____
Windfall rule defined <input type="checkbox"/>	_____

Review Rhythm

Monthly system check ■	_____
Annual review ■	_____
No-panic-changes rule acknowledged ■	_____

Reminder: Design this once when calm. Let automation run. Review only on your schedule.