

# ETF Investment Starter Guide & Planner

Use this printable to research, plan, and track your ETF investments, even if you're starting from scratch.

## Step 1: Define Your Goal

- Long-term or short-term investing? \_\_\_\_\_
- Monthly contribution amount: \_\_\_\_\_
- Time horizon: \_\_\_\_\_

## Step 2: Research ETFs

- ☐ S&P 500 ETF (e.g., VOO, SPY)
- ☐ Total Market ETF (e.g., VTI, ITOT)
- ☐ Dividend ETF (e.g., SCHD, VIG)
- ☐ International ETF (e.g., VXUS, IXUS)
- ☐ Sector ETF (e.g., XLK, XLE)

Write down 2-3 you're interested in:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Step 3: Compare Key Metrics

ETF Symbol: \_\_\_\_\_ Expense Ratio: \_\_\_\_\_

Dividend Yield: \_\_\_\_\_ Holdings Count: \_\_\_\_\_

Top Holdings: \_\_\_\_\_

Risk Level: Low / Medium / High

#### Step 4: Platform Notes

- Chosen Broker/App: \_\_\_\_\_
- Does it support fractional shares? Y / N
- Auto-invest enabled? Y / N
- First investment date: \_\_\_\_\_

#### Step 5: Monthly Tracking Log

Month: \_\_\_\_\_ Investment: \_\_\_\_\_ Value: \_\_\_\_\_ Notes: \_\_\_\_\_

Month: \_\_\_\_\_ Investment: \_\_\_\_\_ Value: \_\_\_\_\_ Notes: \_\_\_\_\_