

Passive Investing Strategy Planner

Use this printable to outline, compare, and track passive investing strategies that suit your lifestyle and financial goals.

Step 1: Choose Your Strategy

☐ Total Market ETF Investing

☐ Dividend Growth Strategy

☐ Robo-Advisor Portfolio

☐ Target-Date Retirement Fund

☐ Real Estate REIT Index Investing

Other: _____

Step 2: Set Investment Goals

- Monthly Contribution: _____

- Time Horizon (Years): _____

- Risk Tolerance (Low/Med/High): _____

- Goal Type (Retirement, Wealth, Income): _____

Step 3: Choose Your Platform or Tool

- Broker/App: _____

- Auto-Invest Setup (Y/N): _____

- Fees or Expense Ratio: _____

Step 4: Track Monthly Contributions & Value

| Month | Strategy | Amount Invested | Current Value | Notes |

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