



Index Fund Checklist

(keep me in your wallet)

Below is a simple checklist that should be used whenever you are contemplating an investment in a Stock Index Fund.

1. What is the expense ratio? If **more than .5% do not bother.**
2. What are the transaction costs? If **more than \$0 do not bother.**
3. Are there any loads? **If so do not bother.**
4. Check the minimum initial investment. **Make sure you can afford it.**
5. Check the minimum additional investment. Make sure you will **be able to contribute additional money frequently.**
6. Continually **invest** weekly, monthly or bi-monthly into your Index Fund selections **for the rest of your life.**

For more information visit TheWaytoBuildWealth.org