Module 5: Index Fund Investing Made Simple

Understand diversification, fees, account types, consistency, and time before choosing what comes next.

NAME _____ DATE _____

1. Account inventory

Account type (401k, 403b, IRA, brokerage, other)	
Provider	
Current balance	
Current contribution	
What I understand / need to learn	

2. Foundation check

Am I diversified beyond one company?	
Do I know the fund expense ratio or major fees?	
Is my contribution consistent?	
Is this money aligned with a long-term timeline?	

3. Remove the first blocker

The first unanswered investing question	
Who or what can help me answer it?	
My smallest safe next step	

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THE GOAL	Progress, not perfection
Use the best information you have today. You can refine your numbers as your life changes.	One clear next step is enough.

Turn the lesson into your next action

One account I will review is:

One fee or holding I want to understand is:

A question to ask a qualified professional or community is:

[ ] I completed the lesson, reviewed this worksheet, and chose my next action.

This worksheet is educational and does not replace personalized financial, investment, tax, or legal advice.