

Investment understanding

Write a question framework that connects investments with purposes and convictions.

Build on earlier weeks: Refer to week 1 goals and week 5 near-term access questions. Do not assume every resource should serve the same time horizon.

Purpose and time

Which goal could an investment serve, and when might the money be needed?

Risk costs and access

What could go wrong? What fees, restrictions and access conditions must I understand?

Values and evidence

What values matter to me? How is a values label defined and checked?

Questions before action

What explanation or qualified review do I need before considering a change?

Keep private: Use categories or initials. No account numbers, passwords, health details or other people's private information. This paper is yours; do not upload it to the site.

No allocation, product, return or values-screen performance is recommended or guaranteed.

Reading pool: Retirement X-Ray printed 65–69; 189–194; Steward's Code Ch.10 pp.59–64; Ch.7 pp.35–43 instructor background — printed pages in retrieved pre-editor manuscript; instructor review required. Source map and review gates accompany the curriculum.