



	INVESTMENT	INVESTMENT	INVESTMENT	INVESTMENT
Exclusivity				
Expert analysis and data validation				
A step-by-step business plan				
Proven strategies				
Diversification				
Inflation hedge				
Expertly-managed assets				
Tax benefits				
Income-producing asset				
Equity appreciation				

INSTRUCTIONS

Part 1. Use the diagram at the top of the first page to rate how important each of the Critical Investment Growth Factors are to you, on a scale from 1-10. (Example pictured right)

For example, you may decide that “Diversification” is the most important factor, so you’d rate that a 10. And perhaps you believe that “Tax Benefits” is the least important factor, so you’d rate that a 1.



- This step gives you clarity into what you value most important or least important. You may look at your current holdings and realize (as many people do) that your investments are not delivering on the Critical Investment Growth Factors that you hold most important. This can prompt a search for investments that do deliver on the factors that you hold most important.
- Additionally, if you’re not aware of what some of the factors are, it’s a great starting point to elevate your own understanding. Ask questions about the importance of each Critical Investment Growth Factor and the impact it can have on your portfolio. (You may change your rating system as you learn more about them. For example, we find that some investors rate “Tax Benefits” pretty low on the score until they discover just how valuable these can be, then they re-rate these factors based on their new knowledge.)

Part 2. Use the chart on the bottom half of the first page and select one or more investments in your portfolio (or, one or more investments that you are thinking of acquiring).

For example, you may choose a couple of the columns to review some of the investments you currently hold, such as a stock, bond, or fund. And, be sure to leave a column to review an investment from FTW Investments. [You can book your one-on-one conversation with FTW Investments here.](#)

As you review each investment, place a checkmark in the column if that investment delivers on that Critical Investment Growth Factor. (Example pictured below) Remember, at FTW Investments, we believe that high-performing portfolios should contain investments that have at least 7 or more Critical Investment Growth Factors.

	INVESTMENT	INVESTMENT	INVESTMENT	INVESTMENT
	Ex. 1	Ex. 2	Ex. 3	Ex. 4
Exclusivity	✓		✓	✓
Expert analysis and data validation			✓	✓
A step-by-step business plan	✓		✓	
Proven strategies	✓			✓
Diversification		✓		✓

To book your one-on-one conversation with FTW Investments, click here and select an appointment time: <https://ftwinvestmentsllc.com/actionplantraining/>