

# PROVEN PROCESS FOR SUCCESSFUL INVESTING

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## Questions to Consider:

- › What structure will you use as you define your investment approach?

## Guidance

One of the biggest differences between successful and unsuccessful private investing is discipline and structure. Having a clearly defined approach and adhering to those rules on the very professional basis is key to successful private investing.

Step by step investment process:

- › Define your own investment objectives and process. What do you want and how are you going to get it?
  - › Consider time frame, ability, funding, and understand how that's going to work.
- › Agree on likely forward macro scenarios.
  - › If you're working on an annual basis what do you think will happen in the next year.
    - › What has happened in the world economy?
    - › What has happened in the economy you're going to be investing in?
  - › How are you going to understand and respond to change?
- › Identify the most dangerous risks and most attractive opportunities.
  - › Decide in what area you're going to invest and how to manage the inherent risks of that area.
- › Define the asset allocation model and strategy within each class.
  - › How much money will you be investing, and how will you allocate those funds.
- › Carry out due diligence on managers and individual Investments.
- › Monitor and adjust investor mix.
- › Ensure timely reporting.
- › Control costs.
- › Monitor manager's and portfolio closely.

Set up your process step by step, understand content in each facet, manage your money like a professional, and avoid the emotional traps people often fall into. By creating a structure and following it strictly, you can set yourself up for successful investing.