



The First Investment Checklist

Your first buys build trust with yourself. Clear all four before money moves.

I asked the dumb question

If you can't explain it, you don't own it yet.

☐

I have a script to say no

Peer pressure dies against a prepared sentence.

☐

I vetted who runs it, not just the story

Management and track record, before money moves.

☐

This buy is tied to a goal

FOMO can't survive a target.

☐

The goal this buy moves me toward

e.g. 6 months of expenses saved, or my first \$1,000 invested.

E.G. *The no-script: 'I'm passing on this one, it's outside my plan. Send me the next one though.'*

Goals, scripts, and homework.

Protect the trust you're building with yourself.