PERSONAL FINANCE *for PhDs*

Seven Steps to Start Investing

Investment Account #__

Brokerage Firm: ____________________________________

Account Type:

	Roth	Traditional		Roth	Traditional
IRA	☐	☐	TSP	☐	☐
403(b)	☐	☐	SIMPLE IRA		☐
457	☐	☐	SEP IRA		☐
401(k)	☐	☐	Taxable	☐	

How is the money invested (asset allocation and/or list of funds)?