Twitter Thread by Brian Feroldi

Brian Feroldi
@BrianFeroldi

1/ I'm a huge fan of checklists

I use them every day to help me find great investments

Want to create your own investment checklist?

Here are some great resources to help you get started

■■



2/ Here's my free public spreadsheet that details my current checklist

https://t.co/3XTFXy0Zap

3/ Here's my detailed board post about how to use the checklist

https://t.co/Wovl5t1Ami

4/ Here's a detailed thread on Michael Shern's EXCELLENT investment checklist

https://t.co/aZiIqCIOVY

> Just finishing reading "The Investment Checklist" by Michael Shearn.
>
> It's EXCELLENT.
>
> I HIGHLY recommend it!
>
> (Puts my checklist to shame.)
>
> Here's the book's checklist:
> \U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447
>
> — Brian Feroldi (@BrianFeroldi) July 4, 2020

5/ Here's a thread on how I created my checklist

https://t.co/wbA3UYPzpJ

> 1/ How to create an investment checklist (thread)
>
> Checklists are an amazing, FREE, underutilized investing tool
>
> Here's the step-by-step process for how to create your own
>
> \u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f\u2b07\ufe0f
>
> — Brian Feroldi (@BrianFeroldi) December 8, 2020

6/ Here's a thread on a free personal finance checklist that I made

https://t.co/QYHH8nQJE8

> 1/
>
> My Mission: To Spread Financial Wellness (thread)
>
> I added some free sheets to my public checklist to help do just that
>
> New Tabs:

1\u20e3Profile
2\u20e3Personal Finance Checklist
3\u20e3Goals
4\u20e3Income Statement
5\u20e3Net Worth Statement

Details are below
\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447\U0001f447

— Brian Feroldi (@BrianFeroldi) November 29, 2020

7/ Great books

The Checklist Manifesto by Atul Gawande

The Investment Checklist by Michael Shearn

8/ Tim Beyer's innovation checklist
https://t.co/26OzmXQxtC

9/ @SeifelCapital great checklist

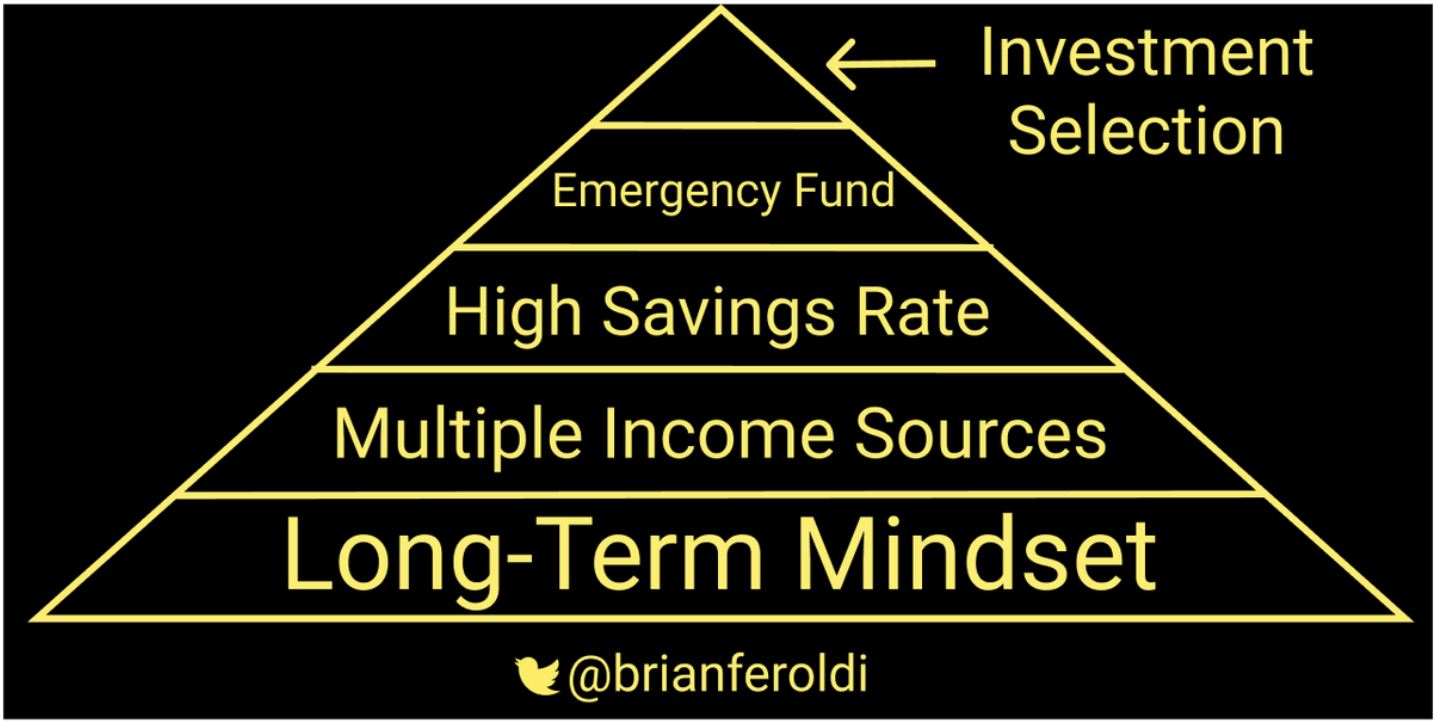
https://t.co/Zggi0zjk8t

10/ Common Stock Checklist by Phil Fisher

https://t.co/yx5Vh36z1x

11/ If this was helpful, I publish free financial graphics daily

Interested? https://t.co/SjeNPq5bzl


Investment Selection
Emergency Fund
High Savings Rate
Multiple Income Sources
Long-Term Mindset
@brianferoldi