

A responsible investor should "regularly review your portfolio to ensure that you're following your own chosen philosophy and that you are on track to reach your financial goals."

Best idea: Write them down

Responsible Investor?

Identify what you need to do:

 Philosophy
 Goals
 Review

 How often to do it
 Schedule when to do it

Enter all investment transactions in investment recordkeeping software or notebook.
 Read through all financial statements you receive
 Reconcile all relevant statements against your accounting records

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Read any quarterly reports you receive
 Update the Stock Selection Guide for any individual stock you own

 -Earnings
 -News

Make your own annual report for your portfolio

--Diversification
--Return for the whole portfolio
--Return for individual entities

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Compare portfolio returns to goal s from last year
 Set financial goals for the year ahead
 Make a plan

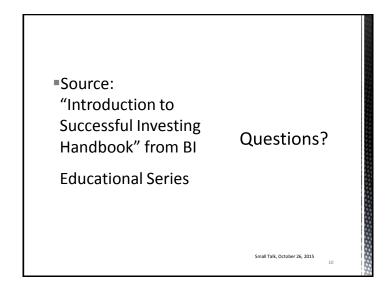
Annually (cont.)

Read annual reports for all portfolio holdings
 Attend stockholder meetings OR Vote your proxy

Annually (cont.)
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