



## Investment Management Plan

***Business Owner Action Item:*** Create an investment management plan.

***Why is This Important?*** The business owner will have a life-changing amount of cash after the sale and should create an investment management plan to grow the sale proceeds.

***In My Experience:*** The business owner should consider alternative investments in his portfolio.

The investment management plan defines investment objectives and tracks portfolio performance. The steps to creating an investment management plan generally include the following:

1. Establish investment objectives;
2. Determine risk tolerance;
3. Determine asset allocation;
4. Create the portfolio; and
5. Monitor the portfolio.