

INVESTOR Milestone CHALLENGE

Instructions for Completing the Investor Milestone Challenge Sheet

The participation sheet is designed to help you track your investment activity and the milestones you are targeting or achieving over time. Each column in the table captures a specific part of your investment journey. Follow the guidance below when filling it in:

Month	Stock Name / Index	Previous Milestone	Milestone Expected	Milestone Announced	Year Achieved
<p>This refers to the month in which you made your investment. Record the exact month you invested (e.g., January, February, etc.) to track consistency over time.</p>	<p>Enter the name of the product you invested in during that month. This can be either an individual stock (company name) or an ETF/index (e.g., S&P 500 ETF, Top 40 Index, etc.).</p>	<p>Applies mainly to ETF or index-focused investing. Record the last major milestone (previous record high). For example, if an index is around 9,000 points and previously reached 10,000, then the previous milestone is 10,000.</p>	<p>This is the next milestone you are aiming for. For index investing: target at least 1,000 points above the previous milestone. For stocks: milestones include dividends, buybacks, or stock splits.</p>	<p>Applies to stock investors tracking corporate actions. Record what the company officially announced that aligns with your expected milestone (e.g., dividend, buyback, or stock split).</p>	<p>This is the date (month and year) the milestone was achieved, such as a record high, dividend payout, stock split, or share buyback completion.</p>

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Cay-Lowe Mbedzi
FOUNDER

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