

# Investment Success

## Step #1

Clarify the goal:

1. Why are we saving? (A new house, children's college costs, retirement)
2. How much money will we need?
3. How much time do we have to meet our goal?
4. Are there any tax preferred plans available to help us?

Such as; an IRA or 401K Plans at work or a 529 Plan for college costs.



**The IRA Club**  
333 N. Michigan Ave  
Suite 2220  
Chicago, IL 60601  
312-795-0988

[dennisblitz.com](http://dennisblitz.com)