

# Investment Thesis Template

**Account Name:**

**Ticker Symbol or Description:**

**Purchase Date:**

**Current Holding, total shares:**

**Original Investment, Dollar Cost:**

**Cost/share:**

**Dividend/share:**

**Dividend Frequency:**

**Dividend Yield:**

**Current Ex-dividend Date:**

**Dividend Payment Date:**

**Original Investment Goals (check any that apply, and/or prioritize by number):**

Preservation of Capital ( )

Inflation Protection ( )

Income ( )

Appreciation ( )

Dividend Growth ( )

TTL Return ( )

Valuation ( )

Growth ( )

Dollar Cost Averaging ( )

Speculation ( )

Sentiment Correction ( )

Diversification ( )

**Original expected time frame:**

Short Term ( )

Long Term ( )

**Rationale for the investment:**

**Review Date(s) and Comment(s):**