

Your First 30 Days Investing Checklist

The exact steps to go from \$0 invested to fully automated.

WEEK 1 : SET THE FOUNDATION

- ☐ Open a HYSA at SoFi. Start building 3-6 months of expenses here
- ☐ Open a Roth IRA at SoFi, Fidelity, or Schwab
- ☐ Transfer your first \$100 into the Roth IRA. Amount does not matter. Starting does.

WEEK 2 : MAKE YOUR FIRST INVESTMENT

- ☐ Buy your first share of VOO inside your Roth IRA
- ☐ Log into your 401k through work. Confirm you are contributing at least enough to get the employer match
- ☐ Check if your employer offers an HSA. If yes, enroll and start contributing

WEEK 3 : BUILD THE HABIT

- ☐ Set up automatic transfers from your paycheck to your Roth IRA
- ☐ Set up automatic investment inside your Roth IRA so VOO buys itself
- ☐ Write down your monthly take-home pay and how much you can realistically invest

WEEK 4 : LOCK IT IN

- ☐ Review all accounts. Confirm everything is set to auto
- ☐ Open a brokerage account if your Roth IRA is maxed or you want to invest more
- ☐ Tell one person what you did this month. Accountability compounds too.

Not financial advice. This is what I personally do. Always do your own research.

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