

Twitter Thread by Brian Feroldi



Brian Feroldi

@BrianFeroldi



1/ I'm a huge fan of checklists

I use them every day to help me find great investments

Want to create your own investment checklist?

Here are some great resources to help you get started



10X Returns

- | | | |
|-------------------------|----------------------|-------------------------|
| ✓ Diversified Customers | ✓ Mission Driven | ✓ Recession Proof |
| ✓ Expanding Margins | ✓ Operating Leverage | ✓ Recurring Revenue |
| ✓ Free Cash Flow | ✓ Optionality | ✓ Reinvestment |
| ✓ Great Workplace | ✓ Organic Growth | ✓ Strong Balance Sheet |
| ✓ Inside Ownership | ✓ Over Deliver | ✓ Top Dog & First Mover |
| ✓ Low Risk | ✓ Pricing Power | ✓ Under Promise |
| ✓ Market-Beater | ✓ Profitable | ✓ Widening Moat |

Find Them, Buy Them, Own Them

 **@brianferoldi**

2/ Here's my free public spreadsheet that details my current checklist

<https://t.co/3XTFXy0Zap>

<https://t.co/Wovl5t1Ami>

<https://t.co/aZilqCIOVY>

— Brian Feroldi (@BrianFeroldi) July 4, 2020

<https://t.co/wbA3UYPzpJ>

— Brian Feroldi (@BrianFeroldi) December 8, 2020

<https://t.co/QYHH8nQJE8>

New Tabs:

- 1\ Profile
- 2\ Personal Finance Checklist
- 3\ Goals
- 4\ Income Statement
- 5\ Net Worth Statement

Details are below

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— Brian Feroldi (@BrianFeroldi) November 29, 2020

7/ Great books

The Checklist Manifesto by Atul Gawande

The Investment Checklist by Michael Shearn

8/ Tim Beyer's innovation checklist
<https://t.co/26OzmXQxtC>

9/ [@SeifelCapital](#) great checklist
<https://t.co/Zggi0zjk8t>

10/ Common Stock Checklist by Phil Fisher
<https://t.co/yx5Vh36z1x>

11/ If this was helpful, I publish free financial graphics daily

Interested? <https://t.co/SjeNPq5bzl>

← Investment
Selection

Emergency Fund

High Savings Rate

Multiple Income Sources

Long-Term Mindset

🐦 @brianferoldi