

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>

3/ Here's my detailed board post about how to use the checklist

<https://t.co/Wovl5t1Ami>

4/ Here's a detailed thread on Michael Shern's EXCELLENT investment checklist

<https://t.co/aZilqCIOVY>

Just finishing reading "The Investment Checklist" by Michael Shearn.

It's EXCELLENT.

I HIGHLY recommend it!

(Puts my checklist to shame.)

Here's the book's checklist:

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— Brian Feroldi (@BrianFeroldi) [July 4, 2020](#)

5/ Here's a thread on how I created my checklist

<https://t.co/wbA3UYPzpJ>

1/ How to create an investment checklist (thread)

Checklists are an amazing, FREE, underutilized investing tool

Here's the step-by-step process for how to create your own

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— Brian Feroldi (@BrianFeroldi) [December 8, 2020](#)

6/ Here's a thread on a free personal finance checklist that I made

<https://t.co/QYHH8nQJE8>

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My Mission: To Spread Financial Wellness (thread)

I added some free sheets to my public checklist to help do just that

New Tabs:

1\u20e3Profile

2\u20e3Personal Finance Checklist

3\u20e3Goals

4\u20e3Income Statement

5\u20e3Net 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/SjeNPq5bzI>

← Investment Selection

Emergency Fund

High Savings Rate

Multiple Income Sources

Long-Term Mindset

🐦 @brianferoldi