

FREE VERSION

90-Day Personal Wealth & Investment Action Guide

Practical, direct, and actionable
guidance



DATE

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SOURCE

The OriCode

90-Day Wealth & Investment Action Plan

Your Current Financial Status

You have steady savings ability but income requires significant effort, with your finances currently needing a defensive posture for the next 90 days starting from a \$0 speculative position.

Suitable Investment Style

Direction: Focus on protection-first strategies using high-grade bonds and cash management to shield capital.

Primary Rhythm: Adopt a goal-based bucket strategy, allocating 70% of new funds to safety and 30% to long-term growth.

Entry Method: Use dollar-cost averaging exclusively into broad-market ETFs for the growth portion, starting with a fixed amount each month.

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