Now that you’ve built more knowledge to help you invest with confidence, it’s time to put what you’ve learned into action. There are tools available to help you make decisions and keep building your investment confidence.

### Your action plan

1. **Complete the Asset allocation tool.**
   - This is your first step in determining an appropriate investment strategy that meets your short- or long-term goals. It will only take you a few minutes to complete.
   - Go to [mySunLife.ca > my financial centre > Resource Centre > my money tools > Asset allocation](https://www.mysunlife.ca/)

2. **Compare your fees.**
   - Compare the fees you pay in your group plan to those you would pay as an individual investor.
   - Go to [mySunLife.ca > my financial centre > Accounts > Account fees](https://www.mysunlife.ca/)

3. **Review Morningstar® via mySunLife.ca.**
   - There is a wealth of information available through Morningstar®. The fund page reports will provide information such as how the fund is managed, top holdings, sector and geographical allocation.
   - Go to [mySunLife.ca > my financial centre > Accounts > Investment performance](https://www.mysunlife.ca/)

4. **Learn about the markets at:**
   - [sunlifeglobalinvestments.com](https://www.sunlifeglobalinvestments.com)
   - [blackrock.com/investing/insights](https://www.blackrock.com/investing/insights)
   - [bloomberg.com/markets](https://www.bloomberg.com/markets)

Handy tip:
It’s easy to get caught up in all the demands on your time and forget about your action plan. To stay on track, put each of the checklist items in your calendar or smartphone so you remember to take action regularly.