

Legacy Investor Toolkit

ETF Screening Checklist — ETF Empire

■ Core Criteria

- Expense Ratio (under 0.20% preferred)
- Dividend Yield (sustainable, not inflated)
- Sector Exposure (balanced, no overconcentration)
- Historical Performance (5–10 year track record)
- Liquidity (average daily volume)
- Fund Size (larger funds tend to be more stable)

■ Portfolio Fit

- Core Foundation ETF
- Dividend Income ETF
- Specialized / Thematic ETF
- Defensive Shield ETF

■ Notes Section

Bonus Examples (with symbolic nicknames):

- Empire Builder — VTI (Total U.S. Market)
- Dividend Torch — SCHD (Dividend Growth)
- Global Shield — VXUS (International Exposure)