

# PORTFOLIO ALLOCATION

Period: \_\_\_\_\_ 20\_\_\_\_

TOTAL ASSET VALUE

**\$ 0.00**

TARGET ROI

**0.0%**

RISK PROFILE

**Moderate**

ASSET CLASS	CURRENT WEIGHT	TARGET %	ALLOCATION BAR	REBALANCE
Domestic Equities	0.00%	40%		\$
International Stocks	0.00%	20%		\$
Fixed Income / Bonds	0.00%	25%		\$
Real Estate / REITs	0.00%	10%		\$
Cash Equivalents	0.00%	5%		\$

STRATEGIC OBSERVATIONS & REBALANCING NOTES