

FINANCIAL RATIO ANALYSIS

Quarterly Review Summary

100% TOTAL

- **30%** Liquid Savings
- **25%** Long-term Investments
- **25%** Secured Debt (Mortgage)
- **20%** Unsecured Debt

CATEGORY	CURRENT BALANCE	TARGET %	STATUS
Emergency Fund	\$15,000	20%	Optimal
Retirement (401k)	\$45,000	40%	Growth Phase
Consumer Debt	\$8,200	< 5%	Action Required

Generated on October 26, 2023 â€¢ Private Financial Record