

FINANCIAL ALLOCATION

Annual Strategy Review 2024/25

- 50% Essential Living
- 20% Retirement & Equity
- 15% Discretionary Spend
- 10% Debt Reduction
- 05% Emergency Liquid

CATEGORY	ALLOCATION (%)	PROJECTED VALUE (\$)
Housing & Utilities	50%	\$45,000
Long-term Investments	20%	\$18,000
Lifestyle & Travel	15%	\$13,500
High-Interest Debt	10%	\$9,000
Cash Reserve	5%	\$4,500
Annual Total	100%	\$90,000