

RETIREMENT ALLOCATION CHART

Fiscal Period: _____

Target Retirement Date: _____

ASSET CLASS / FUND	0- 20%	21- 40%	41- 60%	61- 80%	81- 100%	TARGET %
Domestic Equities (Large Cap)						
International Equities						
Fixed Income / Bonds						
Real Estate (REITs)						
Cash Equivalents						
Alternative Investments						

MONTHLY REBALANCING STRATEGY

RISK TOLERANCE ADJUSTMENT