

WEALTH ALLOCATION

Monthly Percentile Distribution Tracking

REPORTING MONTH/YEAR
TOTAL INVESTABLE INCOME

Asset Category	Target %	Allocation Visual
Low-Cost Index Funds		
Individual Equities		
Real Estate / REITs		
Fixed Income / Bonds		
Cash Equivalents (HYSA)		
Speculative / Alternative		
TOTAL	100%	

STRATEGY NOTES & ADJUSTMENTS