

ASSET ALLOCATION STRATEGY

Date: _____

Target Allocation

ASSET CLASS	TARGET %
Domestic Equities (Stocks)	
International Equities	
Fixed Income (Bonds)	
Cash & Equivalents	
Real Estate / REITs	
Alternative Assets	
Total	100%

Visual Distribution

(Sketch Pie Chart)

Risk Profile

Conservative Moderate Aggressive

Rebalancing Rules & Notes

Rebalance Threshold (+/- %):