

PORTFOLIO GROWTH TRACKER

Annual Projection & Asset Distribution

Fiscal Year: 2024 - 2034

STARTING BALANCE

\$100,000.00

TARGET GOAL

\$1,250,000.00

AVG. ANNUAL RETURN

8.5%

YEARS TO MATURITY

10 Years

YEAR	ANNUAL CONTRIBUTION	ESTIMATED GROWTH	YEAR-END BALANCE	MILESTONE PROGRESS
Year 1	\$24,000	\$8,500	\$132,500	
Year 3	\$24,000	\$17,200	\$205,400	
Year 5	\$30,000	\$28,900	\$385,000	
Year 10	\$36,000	\$88,400	\$1,250,000	

STRATEGY NOTES

ASSET ALLOCATION

• Domestic Equities: 60%

• International Equities: 20%

• Fixed Income: 15%

• Cash/Alternatives: 5%