

ADVANCED MONTHLY SAVINGS STRATEGY

Financial Year: 2024 | Planning & Allocation

Target Savings Rate: 35%

Saving Instrument	Category	Allocation Strategy	Target Amount	Actual Contribution
Emergency Fund (HYSA)	Liquidity	6-Month Buffer	\$0.00	\$0.00
Retirement (401k/IRA)	Long-Term	Employer Match + Max	\$0.00	\$0.00
Brokerage Index Funds	Growth	DCA (S&P 500)	\$0.00	\$0.00
High-Yield Dividends	Income	Reinvestment Mode	\$0.00	\$0.00
Alternative Assets	Speculative	5% Cap Exposure	\$0.00	\$0.00
Sinking Fund (Travel/Major)	Short-Term	Specific Goal Driven	\$0.00	\$0.00
TOTAL MONTHLY TARGET			\$0,000.00	
ACTUAL TOTAL SAVED			\$0,000.00	
VARIANCE ANALYSIS			0.0%	

Notes: