

Portfolio Allocation

INSTRUCTIONS: Go through each of your savings and investment accounts and allocate your investments individually or by total between the various investment types. If desired, adjust the categories and add columns to break down investments further (such as large cap vs. medium cap stocks, etc.).

	Description/Ticker	Cash & Equiv	U.S. Stocks	Int'l Stocks	Bonds	REIT	Other	Total	Percentage
Account: Savings	Cash Balance in Savings	0.00						0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Money Market	Money Market Balance	0.00						0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: 401(k)								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: 401(k) Spouse								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Traditional IRA								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Traditional IRA Spouse								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Roth IRA								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Roth IRA Spouse								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: HSA								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!

	Description/Ticker	Cash & Equiv	U.S. Stocks	Int'l Stocks	Bonds	REIT	Other	Total	Percentage
Account: Brokerage Account #1								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Brokerage Account #2								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
Account: Other								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
								0.00	
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
	TOTAL	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!
	Percentages	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Desired Portfolio Allocation								0.00%	