

WHERE IS MY PORTFOLIO NOW?

Fixed Principal (Bank Deposits, Fixed Annuities, Money Markets). \$ _____

Bond-Based Investments

	<u>Short Maturity</u>	<u>Intermediate Maturity</u>	<u>Long Maturity</u>
High Grade			
Medium Grade			
Low Grade ("High Yield")			

Domestic Stock-based Investments

	<u>Value</u>	<u>Blend (Value/Growth)</u>	<u>Growth</u>
Large Cap			
Mid Cap			
Small Cap			

International Stock-based Investments (also distinguish between first world and third world)

	<u>Value</u>	<u>Blend (Value/Growth)</u>	<u>Growth</u>
Large Cap			
Mid Cap			
Small Cap			

Hard Assets (Home & other Real Estate, Collectibles, Art, etc.). \$ _____

My Business' Realizable Values \$ _____

What is my Investment Philosophy? How Diversified am I by Asset Class?

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