

<b>What Do You Own Now?</b>	<b>Actual \$</b>	<b>% of Total</b>	<b>Sample Allocation %</b>	<b>Sample Allocation \$</b>	<b>Need to Increase or Decrease</b>
<b>Aggressive</b>	\$0	#DIV/0!	20%	\$0	\$0.00
Small Cap					
Mid Cap Growth					
Emerging Markets					
Real Estate					
Commodities					
<b>Growth</b>	\$0	#DIV/0!	35%	\$0	\$0.00
Mid Cap Value					
Large Cap Growth					
International					
<b>Growth &amp; Income</b>	\$0	#DIV/0!	35%	\$0	\$0.00
Large Cap Value					
Balanced					
Real Estate					
International					
<b>Bonds</b>		#DIV/0!	10%	\$0	\$0.00
High Yield					
Long-Term					
Intermediate					
Short-Term					
Munis					
Gov't/Treasuries					
<b>Total Investments</b>	\$0	#DIV/0!	100%	\$0	\$0.00

**SAMPLE ASSET ALLOCATION  
WORKSHEET**

<b><i>From Your Allocation Above:</i></b>							
Total Real Estate			#DIV/0!		10%	\$0	\$0.00
Total Commodities			#DIV/0!		10%	\$0	\$0.00
Total International			#DIV/0!		30%	\$0	\$0.00