

Investment Success

Document #2

Allocation of savings and investments to achieve our goal:

TRADITIONAL		PERCENT OF OUR ASSETS
Cash and Cash Equivalents		
	Savings Accounts	%
	Government Bonds	%
	CD's	%
	Money Market Accts	%
Equities (Stocks)		
	U. S. Stocks	%
	International Stocks	%
	U. S. Mutual Funds	%
	International Mutual Funds	%
	ETF's	%
	R.E.I.T.s	%
	R.E.I.T. Funds	%
	Corporate Bonds	%
Real Estate		
	Single Family	%
	Multi Family	%
	Commercial	%
	Industrial	%
	Strip Malls	%
	Undeveloped Land	%
NON TRADITIONAL INVESTMENTS		
	Write Covered Calls	%
	Private Placement Stock	%
	Limited Liability Companies	%
	Start a Business	%
	Loan Money	%
	Buy Tax Liens	%
	Deeds of Trust	%
Total		100%



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