

# ASSET ALLOCATION WORKSHEET

**BECU Investment Services can help you balance your risks and your rewards.**

The right balance of stocks, bonds and mutual funds can help you mitigate financial risks and increase potential rewards. But with thousands of investments to choose from, where do you start? A financial advisor can help you determine how you can develop a sound asset allocation strategy, which could help you confidently pursue your financial goals.

## **BECU Investment Services contact information**

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To determine your current asset allocation, fill in the boxes.



Investments/ savings	Cash	Bonds	Stocks	
Cash				
Checking account				
Certificate of deposit				
Money market account				
Money market fund				
<b>Investment Accounts</b>				
Mutual funds				
Individual stocks				
Individual bonds				
<b>Retirement Accounts</b>				
IRAs and Keoghs				
401(k) or 403(b) plan				
Annuities				
Profit-sharing plans				
<b>Other</b>				
Cash value life insurance				
Total your assets for each category and class and enter your grand total.				<b>Grand Total</b>
Divide the totals for each asset by your grand total to determine the allocation percentage for each category.				<b>100%</b>

Asset allocation does not ensure a profit or protect against a loss.

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