



COLOR OF MONEY

The Color of Money report illustrates your risk exposure with your current assets, comparing your existing level of risk with your desired level of risk. Classifying assets based on level of risk is a critical component to your overall retirement strategy.



Conservative Investor 1 - 20 You should generally have 1-20 percent of your assets allocated to growth assets, but the majority should be allocated to assets with less risk. You are risk averse, and your main focus is on principal preservation.	Conservative Growth Investor 21 - 40 You should generally have 21-40 percent of your assets allocated to growth assets. The remainder should be allocated to assets with less risk. You are somewhat conservative and do not want to have more than 40 percent of your assets exposed to risk.	Balanced Investor 41 - 60 You should generally have 41-60 percent of your assets allocated to growth assets. The remainder should be allocated to assets with less risk. Moderate growth and a balanced allocation are both important to your long-term success. You understand some risk is necessary in order to potentially get a return greater than inflation.	Moderate Growth Investor 61 - 80 You should generally have 61-80 percent of your assets allocated to growth assets. The remainder should be allocated to assets with less risk. You are more growth oriented, but you are not comfortable with 100 percent of your assets being exposed to risk – maintaining a small portion of assets with less risk is an important part of your allocation.	Growth Investor 81 - 100 You should generally have 81-100 percent of your assets allocated to growth assets. As a growth investor, your primary goal is growing your principal. You understand assets exposed to risk go up and down in value, but you are comfortable heavily investing in them because of the long-term growth potential they may provide.
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SAMPLE REPORT

This illustration is for informational purposes only and is not intended to be a projection or prediction of current or future performance of any specific product. All financial products have an element of risk and may experience loss. Past performance is not indicative of future results.