The NEW MODEL

AFEA American Financial Education Allian

DESIGN

BLUE = CASH

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1%

- · Minimal Growth
- No Losses
- · Mostly Liquid
- Usually Taxable

GREEN = **PROTECTED MONEY**



4-8%

- Moderate Growth
- No Losses
- Tax Deferred & Tax Free Options

RED = **RISKY MONEY**



+30%

- Potentially Higher Growth
- Higher Risk of Loss
- Mostly Liquid

-30%

TYPES OF BLUE MONEY

- Money Market
- Checking Account
- Savings Account
- · Certificate of Deposit
- Treasury Notes
- Saving Bonds

TYPES OF GREEN MONEY

- · Fixed Interest Annuities
- Fixed Indexed Annuities
- Permanent Life Contracts

Must Adhere to Rules

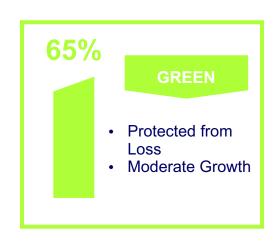
- 1 Protect Principal
- 2 Retain Gains
- 3 Provide Income for Life
- 4 Capable of Tax Free

TYPES OF RED MONEY

- Stocks
 - ETF's
- Bonds
- Mutual Funds
- Options
- REIT's
- Commodities & Futures
- · Variable Annuities
- · Variable Life

SAMPLE: CONSERVATIVE INVESTOR MODEL

10% · Protected from Loss · Minimal Growth





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WORKSHEET

