

The NEW MODEL

DESIGN

BLUE = CASH



1%

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

GREEN = SAFE 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

BLUE

10%

- Protected from Loss
- Minimal Growth

65%

GREEN

- Protected from Loss
- Moderate Growth

RED

25%

- Not Protected from Loss
- Potentially Higher Returns

The NEW MODEL

WORKSHEET

BLUE

GREEN

RED

