

# The NEW MODEL

## DESIGN

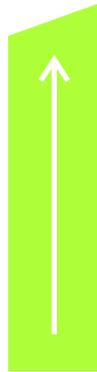
**BLUE = CASH**



**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 Principle
  - 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

