

## TIMEFRAMES PLAN (SAMPLE)

<u>TIMEFRAME:</u>	<u>SHORT-TERM</u>	<u>INTERMEDIATE</u>	<u>LONG-TERM</u>
<b>Type</b>	Checking	Home improvement	Roth IRA
<b>Purpose</b>	Everyday spending	Upgrades in 2 years	W/D after age 70
<b>Money Mix</b>	100% cash	100% CD's	80/20
<b>Type</b>	Savings	Wedding fund	401k plan
<b>Purpose</b>	Emergency reserve	Married in 5 years	W/D after age 60
<b>Money Mix</b>	100% CD's	100% bonds	65/35
<b>Type</b>	Christmas account	European vacation	TOD account
<b>Purpose</b>	Annual gift shopping	Travel in 3 years	W/D after 5 years
<b>Money Mix</b>	100% cash	50% CD's, 50% bonds	50/50
<b>Type</b>			
<b>Purpose</b>			
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<b>Money Mix</b>			

**NOTES:**