

## Financial Planning Process

# INVESTMENT STRATEGY REVIEW

Date

INVESTMENT GOALS	
Time frame	
Money Invested	\$
Additional Expected Savings	\$
Additional Expected Savings Frequency	
Expected Goal Target	\$
INVESTOR EXPECTATIONS/EXPERIENCE	
INVESTMENT POLICY SUMMARY	
CURRENT PORTFOLIO BLEND	
<div> <div>_____ % Equity</div> <div>_____ % Fixed Income</div> <div>_____ % Cash</div> <div>_____ % Alternatives</div> </div>	
RECOMMENDED PORTFOLIO BLEND	
<div> <div>_____ % Equity</div> <div>_____ % Fixed Income</div> <div>_____ % Cash</div> <div>_____ % Alternatives</div> </div>	

RECOMMENDED TRADES