

# INVESTMENT STRATEGY ANALYSIS



Prepared For: \_\_\_\_\_ Date: \_\_\_\_\_

## GOAL & ACCOUNTS COMMITTED TO GOAL

Time Frame	
Money Invested	\$
Additional Expected Savings	\$
Additional Expected Savings Frequency	
Expected Goal Target	\$

## INVESTOR EXPECTATIONS/ EXPERIENCE

## INVESTMENT POLICY SUMMARY

## CURRENT PORTFOLIO BLEND

\_\_\_\_\_ % Equity      \_\_\_\_\_ % Fixed Income      \_\_\_\_\_ % Cash      \_\_\_\_\_ % Alternatives

## RECOMMENDED PORTFOLIO BLEND

\_\_\_\_\_ % Equity      \_\_\_\_\_ % Fixed Income      \_\_\_\_\_ % Cash      \_\_\_\_\_ % Alternatives

Tracking # LFF-0923-2075

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## RECOMMENDATIONS

Empty space for recommendations.

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