

INVESTMENT STRATEGY ANALYSIS



LEVEL FOUR

Financial

A DIVISION OF
LEVEL FOUR GROUP, LLC

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

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INVESTMENT POLICY SUMMARY

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CURRENT PORTFOLIO BLEND

_____ % Equity _____ % Fixed Income _____ % Cash _____ % Alternatives

RECOMMENDED PORTFOLIO BLEND

_____ % Equity _____ % Fixed Income _____ % Cash _____ % Alternatives

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RECOMMENDATIONS