



Quadrant Plan Worksheet

CLIENT NAME: _____

TOTAL INVESTABLE ASSETS: _____

YIELD

Savings, Money Market

FULLY LIQUID / LOW TO NO RETURN

PROTECTED

Annuities, CDs, IUL

PROTECTED FROM MARKET RISK / LONG TERM

BALANCED

Mutual Funds (Bonds & Stock Blends)

FULLY LIQUID / LOWER VOLATILITY

GROWTH

Growth Stocks, ETF's, and Mutual Funds

FULLY LIQUID / HIGHER MARKET RISK