

PREMIER BUCKET SYSTEM™

#1

LIQUID

Money to be consumed in
0-12 months...

How to Invest?
Common Options

- Savings
- Checking
- Money Market
- Short Term CD

#2

INCOME

Money to be consumed in
12 – 48 months...

How to Invest?
Common Options

- Low Risk Funds
(Bonds/Mutual Funds)
- Fee Based Accounts
- Unit Investment Trusts

#3

GROWTH

Money to be consumed after
48 months or longer...

How to Invest?
Common Options

- Mutual Funds
- Variable Annuities
- Stocks
- REITs
- Fee Based Accounts

#4

LEGACY

Money you don't even plan
on spending...

How to Invest?
Common Options

- Life Insurance
- Variable Annuity
- Long Term Care

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