

Sample 360° View

John and Jane Sample
Your Personal Balance Sheet
as at January 1st, 20xx

Portfolio Goals
 Capital Preservation
 Fund Retirement



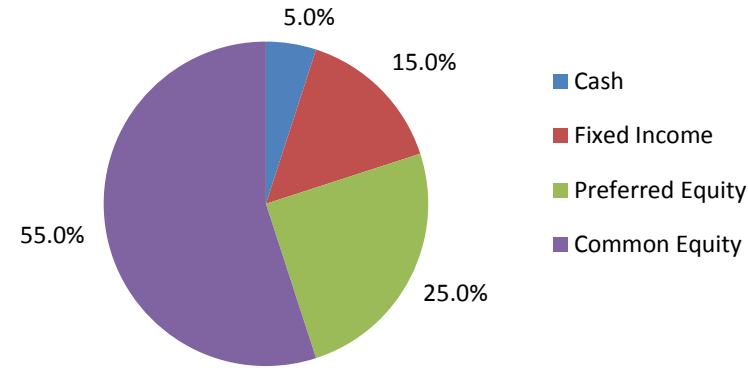
Steele Wealth Management

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 1-877-642-6408 | steelewealthmanagement@raymondjames.ca

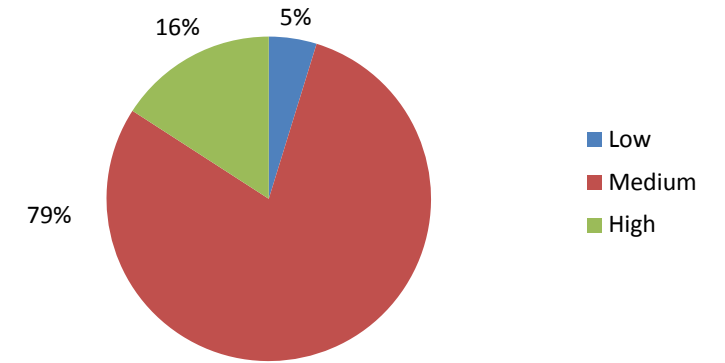
Raymond James Assets

Raymond James Assets	Value	Risk Level (1-10)
Registered	\$500,000	5.00
Non-Registered	\$100,000	8.00
TFSA	\$30,000	3.00
Total:	\$630,000	5.38

Asset Allocation



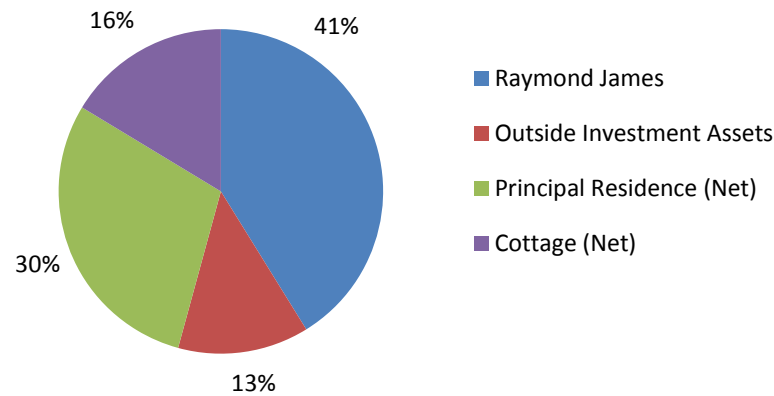
Risk Analysis



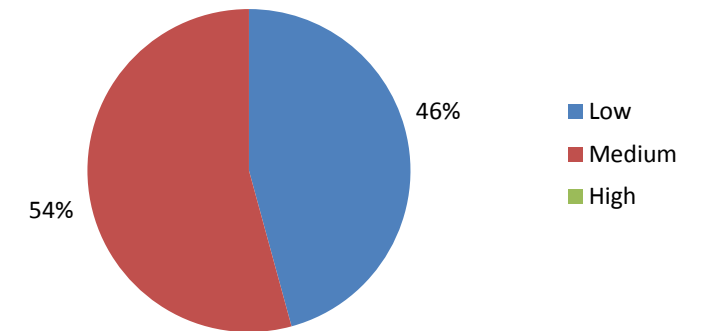
All Assets

Overall Assets	Value	Risk Level (1-10)
Raymond James	\$630,000	5.38
Outside Investment Assets	\$200,000	5.00
Principal Residence (Net)	\$450,000	2.00
Cottage (Net)	\$250,000	3.00
Total:	\$1,530,000	3.95

Asset Breakdown



Risk Analysis



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