



Current Allocation

Suggested Allocation ("30% Bonds & 70% Stocks")

Be sure to jot these percentages down so you have them handy when you're selecting specific funds and completing your investments.

Have questions about your allocation?

[Compare your percentages with other allocation mixes](#)

[Review certain factors before reallocating your assets](#)

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This analysis evaluates your current asset allocation—along with your costs, taxes, and risks—using the same methodologies that underlie our personal advice services.

Ready to choose specific funds?

Keep it simple with an all-in-one fund. These funds are designed to help you simplify the way you manage your portfolio and reduce your investment risk.

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