

Buckets of Money for Bucket Plans



Bucket #1 **Liquidity**

Purpose:
Immediate Needs

Products:
Money Market,
CDs, Savings



Bucket #2 **Lifestyle**

Purpose:
Income

Products:
Fixed Annuity with
Income Rider



Bucket #3 **Long Term Growth**

Purpose:
Inflation

Products:
Diversified Equity
Portfolio



Bucket #4 **Legacy**

Purpose:
Inheritance

Products:
Life Insurance,
Real Estate