



# TRANSAMERICA®

## FINANCIAL ADVISORS, INC.

Transamerica Financial Group Division

Member FINRA, SIPC and Registered Investment Advisor

*"how do you hold your assets?"*

# Tax Efficiency check-up



Client \_\_\_\_\_

Date \_\_\_\_\_

### Taxable

Checking

\$

Savings

\$

Mutual Funds

\$

CDs

\$

Stocks

\$

Bonds

\$

\$

**TOTAL**

\$

### Tax Deferred

IRAs

\$

Annuities

\$

401k/403b/457k

\$



Match

\$

401k/403b/457k

\$



Match

\$

\$

**TOTAL**

\$

### Tax Favored

Roth IRAs

\$

Muni Bonds

\$

Whole Life Insurance

\$

Indexed Life Insurance

\$

Variable Life Insurance

\$

\$

**TOTAL**

\$