

## 529 Plan

### Real Estate Bucket

- Investment Properties

### Non – Qualified Account

- Liquid
- Diversified
- Tax Managed

### Variable Universal Life Ins.

- Liquid
- Tax Def. & Tax Free
- Market Correlated

### Cash Value Life Insurance

- Liquid
- Tax Def. & Tax Free
- Not Corr. To Stock Market

### 401(k)s

- Pre Tax
- Roth
- After Tax

### IRAs

- Traditional (Pre-Tax)
- Roth

