

Tax Triangle

Never Taxed Again

401k Roth: \$_____

Roth IRA:\$ _____

Cash Value Life Ins.: \$_____

Roth TSP: \$_____

Roth 403b: \$_____

Health Savings

Account:\$_____

Total:\$ _____

Always Taxed

401k: \$_____

IRAs:\$ _____

PERA: \$_____

TSPs: \$_____

403b: \$_____

Total:\$ _____

Sometimes Taxed

Bank (Checking/Saving: \$_____

CDs:\$ _____

Brokerage

(Stocks & Mutual Funds:\$_____

Bonds: \$_____

Other accounts: \$_____

Total:\$ _____