

GROWTH PORTFOLIO

4b. Sample portfolio prepared for: John Sample

Application of Funds by %					
Recc. investment term (years):	Proposed Investments	Cautious	Moderate Risk	Aggressive	High Risk
0-2	Cash deposits	40.0%	20.0%		
2-5	Post Office Bonds & Certs				
4-6	Government & Corp. Bonds				
5-7	With Profit Bonds	20.0%	10.0%		
5-7	Tracker Bonds	20.0%	20.0%	10.0%	
5-7	Guaranteed Managed Funds				
5-7	Distribution Bonds				
5-7	Managed Funds	10.0%	15.0%	15.0%	
7-10	Property Funds	10.0%	10.0%	15.0%	15.0%
7-10	Equity Funds		10.0%	20.0%	20.0%
10+	Direct Equities (shares)		10.0%	30.0%	50.0%
10+	Technology		5.0%	10.0%	15.0%
		100.0%	100.0%	100.0%	100.0%

Application of Funds in €					
Recc. investment term (years):	Proposed Investments	Cautious	Moderate Risk	Aggressive	High Risk
0-2	Cash deposits	€246,000	€123,000		
2-5	Post Office Bonds & Certs				
4-6	Government & Corp. Bonds				
5-7	With Profit Bonds	€123,000	€61,500		
5-7	Tracker Bonds	€123,000	€123,000	€61,500	
5-7	Guaranteed Managed Funds				
5-7	Distribution Bonds				
5-7	Managed Funds	€61,500	€92,250	€92,250	
7-10	Property Funds	€61,500	€61,500	€92,250	€92,250
7-10	Equity Funds		€61,500	€123,000	€123,000
10+	Direct Equities (shares)		€61,500	€184,500	€307,500
10+	Technology		€30,750	€61,500	€92,250
		€615,000	€615,000	€615,000	€615,000

