

LJJ Financial Coaching

A Clearer Path to Financial Peace

Investment Inventory

Investment Type	Own	Categorize & Simplify Growth, Income, Real Assets, Don't Know	Diversification Check No, Somewhat, Well, Don't Know
Employer Retirement Accounts (401(k), 403(b), TSP)			
Traditional IRA			
Roth IRA			
Brokerage Account			
Mutual Funds			
Index Funds			
Individual Stocks			
Bonds			
Real Estate Investments			
Crypto			
Other			