



ASSET LOCATION GUIDELINES



Return Priority

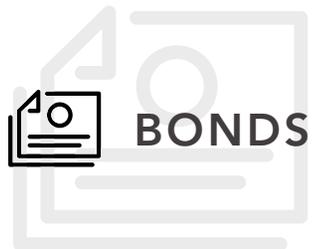
GROWTH/CAPITAL
APPRECIATION

Resulting Tax

CAPITAL GAINS TAX
(Deferred Until Sold)

Recommended Asset Location

RECOMMENDED
IN TAXABLE ACCOUNTS



INCOME/YIELD

INCOME TAX
(Taxed Annually)

RECOMMENDED
IN QUALIFIED ACCOUNTS



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