

# Tax Wealth Map

Where My Money Lives Today



## Pre-Tax / Taxable

401(k), 403(b),  
401(a), ESOP,  
Traditional IRA,  
Pension, EXDC

\$ \_\_\_\_\_

## After-Tax / Taxable

Stocks, Bonds,  
Real Estate,  
Business Interests,  
Bank Accounts,  
CD's, Crypto,  
Annuities

\$ \_\_\_\_\_

## After-Tax / Tax-Free

Roth IRA,  
Roth 401(k),  
Municipal Bonds,  
Cash Value Life  
Insurance, 529's

\$ \_\_\_\_\_

**Health Savings Accounts (HSA's):** \$ \_\_\_\_\_

## NOTES:

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