

## **IRA Investment Reallocation**

This spreadsheet helps you to reallocate your investments in your IRA. Enter your current IRA investments by category. Then input the new percentages (new allocation %). The Change Needed column calculates the amounts by which you will need to increase accounts (negative numbers represent the amounts by which you need to decrease accounts).

Be sure that your new allocation percentages total 100%. Also be sure that the total current allocation amount equals the total you currently have invested.

Data input cells are shaded. All other cells are protected.



