

VeriPlan Overview 4 -- Your investment portfolio assets in VeriPlan

Category : VeriPlan Overview

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Your asset investment portfolio in VeriPlan

(VeriPlan Overview: Part 4 of 7)

For each of your current investment portfolio asset holdings, the VeriPlan personal financial planning software collects information about your share ownership amounts, values per share, investment costs, account taxability, and expected taxable capital gains distributions. VeriPlan automatically projects your net annual holdings by financial asset class, including new investments from future positive net investment returns, rebalancing to maintain your asset allocation strategy, and investment withdrawals to meet future expense budget requirements. Investment portfolio values are automatically projected net of personal living expenses, debt repayments, ordinary income taxes, capital gains taxes, and investment costs throughout your full lifecycle. VeriPlan's fully integrated investment growth calculator projects the growth of your investment portfolio asset values based on historical risk-adjusted and inflation-adjusted cash, bond, and stock asset class growth rates. Growth rates are fully user-adjustable using VeriPlan's systematic and judgmental growth rate adjustment tools. VeriPlan's integrated, automated, and high performance asset projection facilities enable the rapid evaluation of a wide range of customized financial plans. For each of your portfolio asset holdings, VeriPlan separately and automatically projects annual investment returns, volatility, ordinary income taxes, capital gains taxes, and investment costs. Then, in combination, VeriPlan automatically assesses your overall annual net portfolio returns, tax efficiency, and investment cost efficiency. The VeriPlan investment calculators can project these aggregates, even though the net valuation of your individual asset holdings may change at different rates due to user return adjustments, varying investment costs, uneven capital gains distributions, legal differences in taxability, and variations in marginal tax rates. Therefore, VeriPlan can provide significantly more insight, because its projections focus on your particular financial planning circumstances and do not rely upon general population averages.

Your Cash Assets:

VeriPlan projects up to 24 separate cash asset holdings. **Your Bond Assets:**

VeriPlan projects up to 24 separate bond and fixed income asset holdings. **Your Stock Assets:**

VeriPlan projects up to 99 separate stock and equity asset holdings. **Your Property Assets:**

VeriPlan projects up to 10 separate property and real estate asset holdings. **Your Other Assets:**

VeriPlan projects up to 10 separate other asset holdings.

Your Human Capital:

VeriPlan automatically projects your depletable, yet-to-be-earned human capital. Gross human capital is your yet-to-be-earned total wage and earned income. Gross human capital pays your ongoing living expense budget before your retirement, and it provides the potential to save. Net human capital is your yet-to-be-earned savings or your net income from your earnings. You must convert your net human capital into assets that will pay your living expenses, after your human capital or your potential to earn is gone. . VeriPlan Is Simply The [Best Financial Planning](#)

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[Go to part 5 of the VeriPlan Overview-->](#)