

Portfolio Rebalancing Schedule Outline

1. Objective

Define the goal of portfolio rebalancing and outline guiding principles to maintain target asset allocations.

2. Rebalancing Frequency

- Quarterly (e.g., January, April, July, October)
- Annually (e.g., every December)
- Upon Threshold Breach (whenever an asset class deviates by X%)

3. Target Asset Allocation

Asset Class	Target %	Current %
Equities	60%	
Bonds	35%	
Cash	5%	

4. Steps for Rebalancing

1. Review current portfolio allocations.
2. Compare to target allocations and set deviation thresholds (e.g., $\pm 5\%$).
3. Identify assets to buy or sell to restore balance.
4. Execute trades as needed.
5. Document adjustments and rationale.

5. Documentation & Review

- Record each rebalancing event with date and allocation changes.
- Review outcomes and update targets if necessary.