

**NextGen Spending Game - Account Type Matching**

<b>Real World Accounts</b>	<b>Category</b>	<b>Spending Game Account Type</b>
Salary, Social Security, Pensions, Annuity Inflow, Property & Business Income	Inflow	Inflow
Brokerage Account, CD's, Savings Account, Business	Asset	Taxable
401K, 403b, IRA, SEP IRA, Deferred Compensation	Asset	Tax Deferred-BT (Before Tax)
After-Tax (Contributions) IRA	Asset	Tax Deferred-AT (After Tax)
Roth 401K, Roth IRA, 529, HSA, Muni Bonds	Asset	Tax-Free
Private Loan Note Receivable	Asset	Note
Annuity	Asset	Annuity
Primary House, Vacation House, Rental Property	Asset	Property
Life Insurance - Whole Life, Universal Life (Variable, Indexed, Fixed)	Asset	Permanent Insurance
Car Loan, Mortgage, HELOC, PLI Loan, Margin Loan	Liability	Loan
Credit Card	Liability	Credit Card
Lifestyle Expenses, Protection Expenses, College Costs, Medical Costs, Real Estate Expenses, Car Lease, Specific Taxes, LTC Expenses/Insurance	Outflow	Outflow
Term Life Insurance	Outflow	Term Insurance

# PEM View of SG Account Types & Cash Flow Reconciliation

