

Checkliste für die Geldanlagen

Nr.	Art der Sparanlage ¹	Gesellschaft, Institut ²	Beginn Ende	Sparbeitrag, Zahlungsart	①	②	= (②-①) / ①	s. Rückseite
					bisher eingezahlt	Vertragswert Rückkaufswert	Performance in %	Rendite pro Jahr in %
Muster	Fonds-Rente	Musterversicherung AG	01.02.1994- 01.02.2033	150,00 pro Monat	40.000,00	37.500,00 34.124,53	-15%	negativ
Legende					Gesamt:			
1. Klassische oder fondsgebundene Lebens- und Rentenversicherungen, Riester, Basis, Bausparvertrag, bAV, Festgeld, Investmentfonds, Vermögensverwaltung, Wertpapiere, Sparkonten, Guthaben Girokonten, Tagesgeld, etc. 2. Versicherungsgesellschaften, Banken, Investmentgesellschaften, Vermögensverwalter, etc.								

Umrechnungstabelle der Performance in die zugehörige durchschnittliche Rendite pro Jahr

Jahre	Performance																											
	5%	10%	15%	20%	25%	30%	40%	50%	60%	70%	80%	90%	100%	125%	150%	175%	200%	250%	300%	350%	400%	500%	600%	700%	800%	900%		
1	5%	10%	15%	20%	25%	30%	40%	50%	60%	70%	80%	90%	100%	125%	150%	175%	200%	250%	300%	350%	400%	500%	600%	700%	800%	900%		
2	2%	5%	7%	10%	12%	14%	18%	22%	26%	30%	34%	38%	41%	50%	58%	66%	73%	87%	100%	112%	124%	145%	165%	183%	200%	216%		
3	2%	3%	5%	6%	8%	9%	12%	14%	17%	19%	22%	24%	26%	31%	36%	40%	44%	52%	59%	65%	71%	82%	91%	100%	108%	115%		
4	1%	2%	4%	5%	6%	7%	9%	11%	12%	14%	16%	17%	19%	22%	26%	29%	32%	37%	41%	46%	50%	57%	63%	68%	73%	78%		
5	1%	2%	3%	4%	5%	5%	7%	8%	10%	11%	12%	14%	15%	18%	20%	22%	25%	28%	32%	35%	38%	43%	48%	52%	55%	58%		
6	1%	2%	2%	3%	4%	4%	6%	7%	8%	9%	10%	11%	12%	14%	16%	18%	20%	23%	26%	28%	31%	35%	38%	41%	44%	47%		
7	1%	1%	2%	3%	3%	4%	5%	6%	7%	8%	9%	10%	10%	12%	14%	16%	17%	20%	22%	24%	26%	29%	32%	35%	37%	39%		
8	1%	1%	2%	2%	3%	3%	4%	5%	6%	7%	8%	8%	9%	11%	12%	13%	15%	17%	19%	21%	22%	25%	28%	30%	32%	33%		
9	1%	1%	2%	2%	3%	3%	4%	5%	5%	6%	7%	7%	8%	9%	11%	12%	13%	15%	17%	18%	20%	22%	24%	26%	28%	29%		
10	0%	1%	1%	2%	2%	3%	3%	4%	5%	5%	6%	7%	7%	8%	10%	11%	12%	13%	15%	16%	17%	20%	21%	23%	25%	26%		
11	0%	1%	1%	2%	2%	2%	3%	4%	4%	5%	5%	6%	7%	8%	9%	10%	11%	12%	13%	15%	16%	18%	19%	21%	22%	23%		
12	0%	1%	1%	2%	2%	2%	3%	3%	4%	5%	5%	5%	6%	7%	8%	9%	10%	11%	12%	13%	14%	16%	18%	19%	20%	21%		
13	0%	1%	1%	1%	2%	2%	3%	3%	4%	4%	5%	5%	5%	6%	7%	8%	9%	10%	11%	12%	13%	15%	16%	17%	18%	19%		
14	0%	1%	1%	1%	2%	2%	2%	3%	3%	4%	4%	5%	5%	6%	7%	7%	8%	9%	10%	11%	12%	14%	15%	16%	17%	18%		
15	0%	1%	1%	1%	1%	2%	2%	3%	3%	4%	4%	4%	5%	6%	6%	7%	8%	9%	10%	11%	11%	13%	14%	15%	16%	17%		
16	0%	1%	1%	1%	1%	2%	2%	3%	3%	3%	4%	4%	4%	5%	6%	7%	7%	8%	9%	10%	11%	12%	13%	14%	15%	15%		
17	0%	1%	1%	1%	1%	2%	2%	2%	3%	3%	4%	4%	4%	5%	6%	6%	7%	8%	8%	9%	10%	11%	12%	13%	14%	15%		
18	0%	1%	1%	1%	1%	1%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	8%	9%	9%	10%	11%	12%	13%	14%		
19	0%	1%	1%	1%	1%	1%	2%	2%	3%	3%	3%	3%	4%	4%	5%	5%	6%	7%	8%	8%	9%	10%	11%	12%	12%	13%		
20	0%	0%	1%	1%	1%	1%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	8%	8%	9%	10%	11%	12%	12%		
21	0%	0%	1%	1%	1%	1%	2%	2%	2%	3%	3%	3%	3%	4%	4%	5%	5%	6%	7%	7%	8%	9%	10%	10%	11%	12%		
22	0%	0%	1%	1%	1%	1%	2%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	7%	7%	8%	8%	9%	10%	11%	11%		
23	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	3%	3%	3%	4%	4%	4%	5%	6%	6%	7%	7%	8%	9%	9%	10%	11%		
24	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	8%	8%	9%	10%	10%		
25	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	3%	3%	3%	4%	4%	4%	5%	6%	6%	7%	7%	8%	9%	9%	10%		
26	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	2%	3%	3%	4%	4%	4%	5%	5%	6%	6%	7%	8%	8%	9%	9%		
27	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	7%	8%	8%	9%		
28	0%	0%	1%	1%	1%	1%	1%	1%	2%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	7%	8%	8%	9%		
29	0%	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	2%	3%	3%	4%	4%	4%	5%	5%	6%	6%	7%	7%	8%	8%		
30	0%	0%	0%	1%	1%	1%	1%	1%	2%	2%	2%	2%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%	7%	7%	8%	8%		