Gold allocation worksheet (PDF)

UXS · https://uxs.nz/commodities/how-much-gold-should-i-own/ · 2026-11-10 · Educational only, not financial advice

Your numbers only. Nothing here is a recommendation.

Current holdings

Type	Value ($)	Annual cost (fee, storage, insurance)
Physical coins / bars		
Gold ETFs		
Mining shares / funds		
Futures or other		

Sizing test

Total portfolio ($) and gold share (%) _____

Portfolio loss if gold fell 60% (gold share x 0.6) _____

Could I hold for 10+ years without selling? (yes / no) _____

Rules

- [ ] Target share and rebalancing band written down
- [ ] Storage and insurance arranged for physical metal
- [ ] Dealer or fund checked; no leveraged "financed" metal offers
- [ ] Review date set

Sources: World Bank: Commodity markets (Pink Sheet); SEC Investor.gov: Diversify your investments; CFTC: Precious metals fraud advisory; SEC Investor.gov: Commodities. Full explanation and links: https://uxs.nz/commodities/how-much-gold-should-i-own/

Educational content, not financial, tax or legal advice. Trading involves substantial risk of loss. Made by UXS (uxs.nz). Free to print and share unchanged with attribution.