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New York Life's Guidelines: Navigating the Allocation of Municipal Bonds

Arguably, one of the most important pieces of investing is allocation. Getting the right assets classes in the right amounts is a major part of reducing risk and getting the returns you need. For high-ne--worth investors and those looking for tax-free income, an allocation to municipal bonds is a must-have.

But how much in muni bonds should an investor really hold? And what kind of munis?

The answer may not be so simple. However, insurance giant and asset manager New York Life may have some answers depending on what investors want out of their municipal bond portfolio. Their guidelines could serve as a base for advisors and individuals looking toward muni bonds.

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