Portfolio Recommendation - {UserName}

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Asset Class	Sheltered	Taxable	Total Po	ortfolio	Symbol	Mutual Fund	ETF(s)
US Equity - Total Stock Market	\$0	\$28,133	\$28,133	25.6%	VTSMX	Vanguard Total Stock Market Index Fund	VTI
US Equity - Small Cap Value	\$9,378	\$0	\$9,378	8.5%	VISVX	Vanguard Small-Cap Value Index Fund	VBR, IJS
Int'l Equity - All-World ex-US	\$0	\$6,820	\$6,820	6.2%	VFWIX	Vanguard FTSE All-World ex-US Index Fund	VEU
Int'l Equity - Small Cap	\$6,820	\$0	\$6,820	6.2%	VFSVX	Vanguard FTSE All-World ex-US Small Cap	VSS
Int'l Equity - Value	\$6,820	\$0	\$6,820	6.2%	VTRIX	Vanguard International Value Fund	EFV
Bonds - Total Bond Market	\$26,303	\$0	\$26,303	23.9%	VBMFX	Vanguard Total Bond Market Index Fund	BND
Bonds - TIPS	\$10,450	\$0	\$10,450	9.5%	VIPSX	Vanguard Inflation-Protected Securites Fund	TIP
Bonds - Municipals	\$0	\$5,048	\$5,048	4.6%	VWITX	Vanguard Intermed Term Tax-Exempt Fund	TFI, MUB
Real Estate - REITs	\$10,230	\$0	\$10,230	9.3%	VGSIX	Vanguard REIT Index Fund	VNQ
Totals	\$70,000	\$40,000	\$110,000	100%			

Asset Class Breakdown

US Equity Total Stock Market Small Cap Value	\$37,510 \$28,133 \$9,378	25.6%
Int'l Equity	\$20,460	18.6%
Europe	\$8,798	8%
Pacific	\$6,479	5.9%
Emerging Markets	\$3,410	3.1%
North America	\$1,773	1.6%
Bonds	\$41,800	38%
Bonds Treasury/Mortgage Bonds	\$41,800 \$17,097	
	\$17,097	
Treasury/Mortgage Bonds	\$17,097 \$7,628	15.5%
Treasury/Mortgage Bonds Corporate Bonds	\$17,097 \$7,628 \$1,578	15.5% 6.9%
Treasury/Mortgage Bonds Corporate Bonds Foreign Bonds	\$17,097 \$7,628 \$1,578	15.5% 6.9% 1.4% 4.6%
Treasury/Mortgage Bonds Corporate Bonds Foreign Bonds Municipal Bonds	\$17,097 \$7,628 \$1,578 \$5,048	15.5% 6.9% 1.4% 4.6% 9.5%



US Equity, 34.1%

Historical Performance¹

