

Portfolio Recommendation - {UserName}

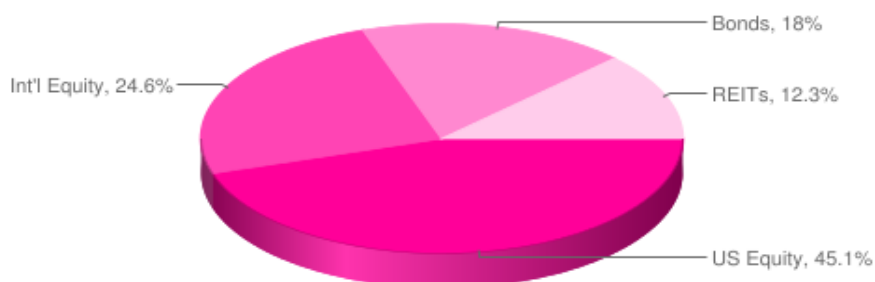
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| Asset Class | Portfolio | Symbol | Mutual Fund | ETF |
|--------------------------------|----------------------|--------|--|-----|
| US Equity - Total Stock Market | \$13,530 45.1% | VTSMX | Vanguard Total Stock Market Index Fund | VTI |
| Int'l Equity - All-World ex-US | \$7,380 24.6% | VFWIX | Vanguard FTSE All-World ex-US Index Fund | VEU |
| Bonds - Total Bond Market | \$5,400 18% | VBMFX | Vanguard Total Bond Market Index Fund | BND |
| Real Estate - REITs | \$3,690 12.3% | VGSIX | Vanguard REIT Index Fund | VNQ |
| Portfolio Total | \$30,000 100% | | | |

Asset Class Breakdown

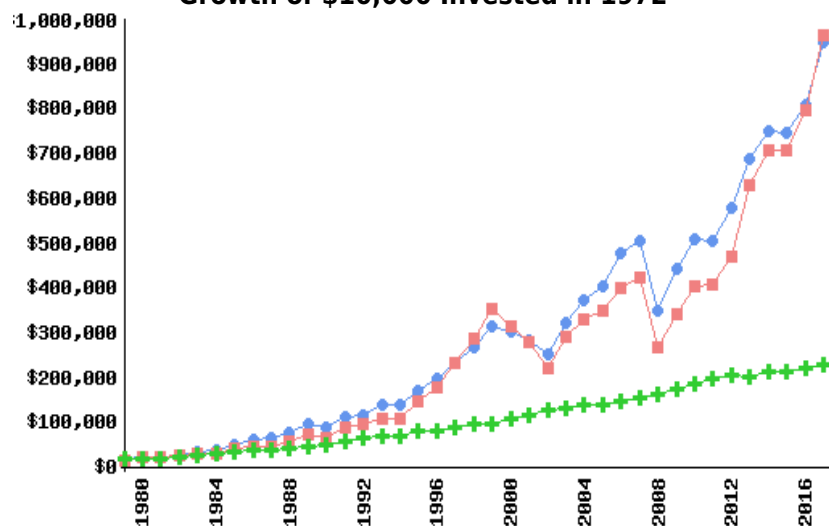
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|----------------------------|-----------------|--------------|
| US Equity | \$13,530 | 45.1% |
| Int'l Equity | \$7,380 | 24.6% |
| Europe | \$3,247 | 10.8% |
| Pacific | \$2,214 | 7.4% |
| Emerging Markets | \$1,476 | 4.9% |
| North America | \$443 | 1.5% |
| Bonds | \$5,400 | 18% |
| Treasury/Mortgage Bonds | \$3,510 | 11.7% |
| Corporate Bonds | \$1,566 | 5.2% |
| Foreign Bonds | \$324 | 1.1% |
| Real Estate (REITs) | \$3,690 | 12.3% |
| Total | \$30,000 | 100% |

Overall Asset Allocation



Historical Performance¹

Growth of \$10,000 Invested in 1972



Modeled Performance Statistics (1972-2017)

| | Compound Annual Return | Standard Deviation (Volatility) | Highest Annual Return | Lowest Annual Return |
|-----------------------|------------------------|---------------------------------|-----------------------|----------------------|
| Recommendation | 10.40% | 13.80% | 34.00% | -31.20% |
| US Stock Market | 10.44% | 17.60% | 38.51% | -37.04% |
| US Bond Market | 7.02% | 5.44% | 25.20% | -2.66% |