

Model Portfolio: Allocations

		Equity	Aggressive	Normal	Moderate	Conservative	Fixed
EQUITY		100%	80%	60%	40%	20%	0%
US STOCKS		70%	56%	42%	28%	14%	0%
US Large Cap	S&P 500 Index	20.0%	16.0%	12.0%	8.0%	4.0%	0.0%
US Large Cap Value	Dimensional US Large Cap Value Index	20.0%	16.0%	12.0%	8.0%	4.0%	0.0%
US Small Cap	Dimensional US Small Cap Index	10.0%	8.0%	6.0%	4.0%	2.0%	0.0%
US Small Cap Value	Dimensional US Small Cap Value Index	10.0%	8.0%	6.0%	4.0%	2.0%	0.0%
Real Estate	Dow Jones US REIT Index	10.0%	8.0%	6.0%	4.0%	2.0%	0.0%
NON-US STOCKS		30%	24%	18%	12%	6%	0%
International Value	Dimensional International Marketwide Value Index	10.0%	8.0%	6.0%	4.0%	2.0%	0.0%
International Small Cap	Dimensional International Small Cap Index	5.0%	4.0%	3.0%	2.0%	1.0%	0.0%
International Small Cap Value	Dimensional International Small Cap Value Index	5.0%	4.0%	3.0%	2.0%	1.0%	0.0%
Emerging Markets	Dimensional Emerging Markets Index	3.0%	2.4%	1.8%	1.2%	0.6%	0.0%
Emerging Markets Value	Dimensional Emerging Markets Value Index	3.0%	2.4%	1.8%	1.2%	0.6%	0.0%
Emerging Markets Small Cap	Dimensional Emerging Markets Small Cap Index	4.0%	3.2%	2.4%	1.6%	0.8%	0.0%
FIXED INCOME		0%	20%	40%	60%	80%	100%
One-Year	ICE BofAML One-Year US Treasury Note Index	0.0%	5.0%	10.0%	15.0%	20.0%	25.0%
Two-Year Global	FTSE World Government Bond Index 1–3 Years (Hedged to USD)	0.0%	5.0%	10.0%	15.0%	20.0%	25.0%
Five-Year Government	Bloomberg Barclays US Treasury Bond Index 1–5 Years	0.0%	5.0%	10.0%	15.0%	20.0%	25.0%
Five-Year Global	FTSE World Government Bond Index 1–5 Years (Hedged to USD)	0.0%	5.0%	10.0%	15.0%	20.0%	25.0%

Rebalanced monthly. For illustrative purposes only.

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