

Determine the appropriate **Investment Portfolio** by using the **Investor Questionnaire** available at [TruepointPlan.com](http://TruepointPlan.com)

Asset Class	Investment Holding	Ticker	Investment Portfolio				
			Aggressive	Growth	Moderate Growth	Conservative Growth	Conservative
<b>Bonds</b>			<b>0.00%</b>	<b>17.00%</b>	<b>27.00%</b>	<b>37.00%</b>	<b>47.00%</b>
	PIMCO Low Duration Institutional	PTLDX	0.0%	7.0%	12.0%	17.0%	22.0%
	PIMCO Total Return Institutional	PTTRX	0.0%	10.0%	15.0%	20.0%	25.0%
<b>US Stocks</b>			<b>60.00%</b>	<b>51.00%</b>	<b>45.00%</b>	<b>39.00%</b>	<b>33.00%</b>
	Vanguard Large Cap Index	VLCSX	25.0%	21.0%	18.5%	16.0%	13.0%
	Vanguard Small Cap Index	VSISX	3.5%	3.0%	2.5%	2.0%	2.0%
	DFA Large Cap Value	DFLVX	7.0%	6.0%	5.5%	4.5%	4.0%
	Vanguard Growth Index	VIGSX	7.5%	6.5%	6.0%	5.5%	5.0%
	DFA Small Cap Value	DFSVX	10.0%	8.5%	7.5%	6.5%	5.5%
	Vanguard Mid Cap Growth Index	VMGIX	7.0%	6.0%	5.0%	4.5%	3.5%
<b>Foreign Stocks</b>			<b>30.00%</b>	<b>24.00%</b>	<b>21.00%</b>	<b>18.00%</b>	<b>15.00%</b>
	DFA International Core Equity	DFIEX	18.0%	14.5%	12.5%	11.0%	9.0%
	Vanguard International Growth	VWIGX	6.0%	4.5%	4.0%	3.5%	3.0%
	DFA Emerging Markets Core	DFCEX	6.0%	5.0%	4.5%	3.5%	3.0%
<b>Real Estate</b>			<b>10.0%</b>	<b>8.0%</b>	<b>7.0%</b>	<b>6.0%</b>	<b>5.0%</b>
	Vanguard REIT Index	VGRSX	6.0%	5.0%	4.0%	3.5%	3.0%
	DFA International Real Estate Securities	DFITX	4.0%	3.0%	3.0%	2.5%	2.0%
<b>Portfolio Total</b>			<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>