

Determine the appropriate **Investment Portfolio** by using the **Investor Questionnaire** available at TruepointPlan.com

| Asset Class | Investment Holding | Ticker | Investment Portfolio | | | | |
|------------------------|--|--------|----------------------|---------------|---------------|---------------|---------------|
| | | | 100/0 | 80/20 | 70/30 | 60/40 | 50/50 |
| US Stocks | | | 60.00% | 51.00% | 45.50% | 39.00% | 33.00% |
| | 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% | 5.5% | 4.5% | 3.5% |
| Foreign Stocks | | | 30.00% | 24.00% | 20.50% | 18.00% | 15.00% |
| | DFA International Core Equity | DFIEX | 18.0% | 14.0% | 12.5% | 11.0% | 9.0% |
| | Vanguard International Growth | VWIGX | 6.0% | 5.0% | 4.0% | 3.5% | 3.0% |
| | DFA Emerging Markets Core | DFCEX | 6.0% | 5.0% | 4.0% | 3.5% | 3.0% |
| Real Estate | | | 10.0% | 8.0% | 7.0% | 6.0% | 5.0% |
| | 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% |
| Bonds | | | 0.00% | 17.00% | 27.00% | 37.00% | 47.00% |
| | 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% |
| Portfolio Total | | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |