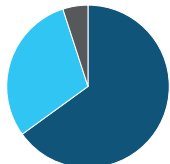
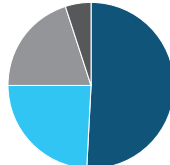
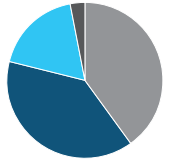
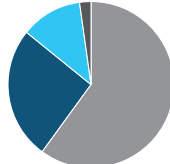
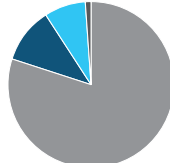
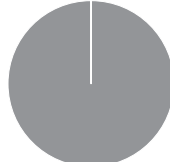




# WM PREFERRED MANAGED PORTFOLIOS

More Aggressive  
↑  
↓  
More Conservative

	OBJECTIVE	ALLOCATION	PORTFOLIO EXPENSES**1	PORTFOLIO GROSS PERFORMANCE*					
Portfolio 100	This portfolio is suitable for someone who wants to take advantage of the long-term potential of the markets and has a risk tolerance to handle the gyrations of the market.	<div><div>U.S. Equity 65%</div><div>Int'l Equity 30%</div><div>Real Estate 5%</div></div> 	0.26%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	0.09%	4.57%	6.48%	18.31%	8.20%
					-0.80%	4.66%	4.29%	15.01%	7.32%
Portfolio 80	This portfolio is suitable for investors who want to take advantage of the long-term potential of the markets but want to reduce the volatility of the portfolio by mixing in bonds.	<div><div>U.S. Equity 51%</div><div>Int'l Equity 24%</div><div>Bonds 20%</div><div>Real Estate 5%</div></div> 	0.23%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	0.71%	4.41%	5.15%	14.38%	6.84%
					-0.01%	4.57%	3.36%	11.71%	6.09%
Portfolio 60	This portfolio is suitable for someone who is nearing retirement or someone who has a moderate risk tolerance.	<div><div>Bonds 40%</div><div>U.S. Equity 39%</div><div>Int'l Equity 18%</div><div>Real Estate 3%</div></div> 	0.18%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	0.90%	4.62%	4.33%	10.81%	5.82%
					0.63%	4.60%	2.69%	8.74%	5.14%
Portfolio 40	This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.	<div><div>Bonds 60%</div><div>U.S. Equity 26%</div><div>Int'l Equity 12%</div><div>Real Estate 2%</div></div> 	0.14%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	1.02%	4.46%	3.14%	7.07%	4.46%
					1.24%	4.41%	1.67%	5.49%	3.85%
Portfolio 20	This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.	<div><div>Bonds 80%</div><div>U.S. Equity 11%</div><div>Int'l Equity 8%</div><div>Real Estate 1%</div></div> 	0.11%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	1.92%	4.83%	1.90%	3.83%	3.18%
					2.28%	4.72%	0.89%	2.89%	2.76%
Portfolio Income	This portfolio is suitable for someone who is in retirement or someone who has a very low risk tolerance.	<div><div>Bonds 100%</div></div> 	0.07%	<b>Portfolio</b>	<b>3 Mo.</b>	<b>1 Yr.</b>	<b>3 Yr.</b>	<b>5 Yr.</b>	<b>10 Yr.</b>
				<b>Benchmark</b>	2.42%	4.93%	0.57%	0.41%	1.79%
					3.09%	4.75%	-0.12%	0.05%	1.52%

\*Source: Morningstar & fi360 through March 31, 2025

Note: Returns are not net of any management or fiduciary fees. <sup>1</sup>Portfolio Expenses (Net Expense Ratio) as Weighted Average Total

Historical performance is based on an assumption that an investor has owned the exact portfolio in the exact allocation reflected in the snapshot for the previous three months, one-, three-, five- and ten-year periods.

Past performance is no guarantee of future results.



# WM PREFERRED MANAGED PORTFOLIOS

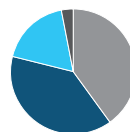
**RETIREMENT**  
PLAN CONSULTANTS LLC **POWERED BY**  
**WEALTH MANAGEMENT**  
A REGISTERED INVESTMENT ADVISOR



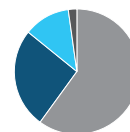
Preferred  
Portfolio  
100



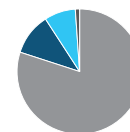
Preferred  
Portfolio  
80



Preferred  
Portfolio  
60



Preferred  
Portfolio  
40



Preferred  
Portfolio  
20



Preferred  
Portfolio  
Income

## Domestic Equity

DFA U.S. Large Company	14	7	8	5	2	0
DFA U.S. Large Company Value	18	16	11	7	4	0
DFA U.S. Small Cap	9	8	5	4	2	0
DFA U.S. Targeted Value	24	20	15	10	5	0

## International Developed Equity

DFA International Value	14	11	8	5	3	0
DFA International Small Cap	4	3	3	2	0	0
DFA International Small Cap Value	8	6	5	3	2	0

## Emerging Markets

DFA Emerging Markets Core	4	4	2	2	1	0
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## Real Estate Securities

DFA Global Real Estate	5	5	3	2	1	0
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## Fixed Income

Vanguard Total Bond Market	0	20	30	40	45	50
Vanguard Total International Bond Index	0	0	10	20	20	25
DFA Inflation Protection Security	0	0	0	0	15	25

<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
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