



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.	<table border="1"> <tr><td>U.S. Equity</td><td>65%</td></tr> <tr><td>Int'l Equity</td><td>30%</td></tr> <tr><td>Real Estate</td><td>5%</td></tr> </table>	U.S. Equity	65%	Int'l Equity	30%	Real Estate	5%	0.26%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>4.06%</td><td>21.50%</td><td>16.69%</td><td>12.80%</td><td>10.94%</td></tr> <tr><td>Benchmark</td><td>3.89%</td><td>21.44%</td><td>16.15%</td><td>10.40%</td><td>10.17%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	4.06%	21.50%	16.69%	12.80%	10.94%	Benchmark	3.89%	21.44%	16.15%	10.40%	10.17%		
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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.	<table border="1"> <tr><td>U.S. Equity</td><td>51%</td></tr> <tr><td>Int'l Equity</td><td>24%</td></tr> <tr><td>Bonds</td><td>20%</td></tr> <tr><td>Real Estate</td><td>5%</td></tr> </table>	U.S. Equity	51%	Int'l Equity	24%	Bonds	20%	Real Estate	5%	0.23%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>3.41%</td><td>18.17%</td><td>13.72%</td><td>9.92%</td><td>9.20%</td></tr> <tr><td>Benchmark</td><td>3.31%</td><td>18.30%</td><td>13.40%</td><td>8.00%</td><td>8.46%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	3.41%	18.17%	13.72%	9.92%	9.20%	Benchmark	3.31%	18.30%	13.40%	8.00%	8.46%
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Portfolio 60	This portfolio is suitable for someone who is nearing retirement or someone who has a moderate risk tolerance.	<table border="1"> <tr><td>Bonds</td><td>40%</td></tr> <tr><td>U.S. Equity</td><td>39%</td></tr> <tr><td>Int'l Equity</td><td>18%</td></tr> <tr><td>Real Estate</td><td>3%</td></tr> </table>	Bonds	40%	U.S. Equity	39%	Int'l Equity	18%	Real Estate	3%	0.18%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>2.78%</td><td>15.22%</td><td>11.82%</td><td>7.89%</td><td>7.67%</td></tr> <tr><td>Benchmark</td><td>2.67%</td><td>15.75%</td><td>11.42%</td><td>5.94%</td><td>7.04%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	2.78%	15.22%	11.82%	7.89%	7.67%	Benchmark	2.67%	15.75%	11.42%	5.94%	7.04%
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Portfolio 40	This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.	<table border="1"> <tr><td>Bonds</td><td>60%</td></tr> <tr><td>U.S. Equity</td><td>26%</td></tr> <tr><td>Int'l Equity</td><td>12%</td></tr> <tr><td>Real Estate</td><td>2%</td></tr> </table>	Bonds	60%	U.S. Equity	26%	Int'l Equity	12%	Real Estate	2%	0.14%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>2.08%</td><td>11.74%</td><td>9.40%</td><td>5.34%</td><td>5.82%</td></tr> <tr><td>Benchmark</td><td>2.01%</td><td>12.97%</td><td>9.03%</td><td>3.53%</td><td>5.31%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	2.08%	11.74%	9.40%	5.34%	5.82%	Benchmark	2.01%	12.97%	9.03%	3.53%	5.31%
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Portfolio 20	This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.	<table border="1"> <tr><td>Bonds</td><td>80%</td></tr> <tr><td>U.S. Equity</td><td>11%</td></tr> <tr><td>Int'l Equity</td><td>8%</td></tr> <tr><td>Real Estate</td><td>1%</td></tr> </table>	Bonds	80%	U.S. Equity	11%	Int'l Equity	8%	Real Estate	1%	0.11%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>1.36%</td><td>9.09%</td><td>7.03%</td><td>2.99%</td><td>4.08%</td></tr> <tr><td>Benchmark</td><td>1.36%</td><td>10.21%</td><td>6.71%</td><td>1.68%</td><td>3.78%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	1.36%	9.09%	7.03%	2.99%	4.08%	Benchmark	1.36%	10.21%	6.71%	1.68%	3.78%
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Portfolio Income	This portfolio is suitable for someone who is in retirement or someone who has a very low risk tolerance.	<table border="1"> <tr><td>Bonds</td><td>100%</td></tr> </table>	Bonds	100%	0.07%	<table border="1"> <tr><td>3 Mo.</td><td>1 Yr.</td><td>3 Yr.</td><td>5 Yr.</td><td>10 Yr.</td></tr> <tr><td>Portfolio</td><td>0.58%</td><td>6.08%</td><td>4.70%</td><td>0.38%</td><td>2.20%</td></tr> <tr><td>Benchmark</td><td>0.64%</td><td>7.46%</td><td>4.39%</td><td>-0.43%</td><td>2.10%</td></tr> </table>	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.	Portfolio	0.58%	6.08%	4.70%	0.38%	2.20%	Benchmark	0.64%	7.46%	4.39%	-0.43%	2.10%						
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*Source: Morningstar & fi360 through December 31, 2025

Note: Returns are not net of any management or fiduciary fees. ¹Portfolio 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
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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
Real Estate Securities						
DFA Global Real Estate	5	5	3	2	1	0
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
Total	100%	100%	100%	100%	100%	100%