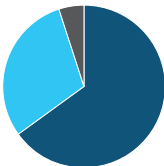
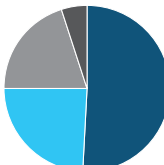
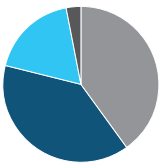
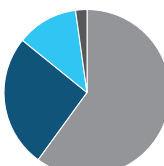
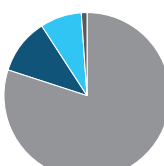




# WM PREFERRED MANAGED PORTFOLIOS

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>                       | 0.23%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>11.06%</div><div>14.06%</div></div> <div><div>28.14%</div><div>31.02%</div></div> <div><div>18.96%</div><div>19.26%</div></div> <div><div>11.58%</div><div>10.07%</div></div> <div><div>12.14%</div><div>11.42%</div></div> |  |  |  |  |  |
| 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>   | 0.20%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>8.97%</div><div>11.46%</div></div> <div><div>23.23%</div><div>25.68%</div></div> <div><div>15.71%</div><div>16.06%</div></div> <div><div>9.06%</div><div>7.91%</div></div> <div><div>10.06%</div><div>9.36%</div></div>     |  |  |  |  |  |
| 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>   | 0.16%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>6.94%</div><div>8.55%</div></div> <div><div>17.80%</div><div>19.13%</div></div> <div><div>12.93%</div><div>13.00%</div></div> <div><div>7.28%</div><div>5.95%</div></div> <div><div>8.20%</div><div>7.51%</div></div>       |  |  |  |  |  |
| 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>  | 0.13%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>5.10%</div><div>6.07%</div></div> <div><div>12.88%</div><div>13.59%</div></div> <div><div>9.97%</div><div>9.95%</div></div> <div><div>5.07%</div><div>3.74%</div></div> <div><div>6.02%</div><div>5.42%</div></div>         |  |  |  |  |  |
| 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>  | 0.10%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>2.99%</div><div>3.39%</div></div> <div><div>8.15%</div><div>8.29%</div></div> <div><div>7.09%</div><div>6.96%</div></div> <div><div>2.97%</div><div>1.95%</div></div> <div><div>3.95%</div><div>3.55%</div></div>           |  |  |  |  |  |
| 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%                 | <div><div>3 Mo.</div><div>1 Yr.</div><div>3 Yr.</div><div>5 Yr.</div><div>10 Yr.</div></div> <div><div>Portfolio</div><div>Benchmark</div></div> <div><div>0.98%</div><div>0.78%</div></div> <div><div>3.24%</div><div>2.91%</div></div> <div><div>4.17%</div><div>3.94%</div></div> <div><div>0.66%</div><div>-0.08%</div></div> <div><div>1.73%</div><div>1.52%</div></div>          |  |  |  |  |  |

\*Source: Morningstar & fi360 through June 30, 2026

Note: Returns are not net of any management or fiduciary fees. <sup>†</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.

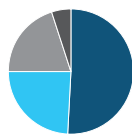


## WM PREFERRED MANAGED PORTFOLIOS

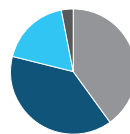
**RETIREMENT**  
PLAN CONSULTANTS LLC **POWERED BY**  
**WEALTH MANAGEMENT**  
A REGISTERED INVESTMENT ADVISOR



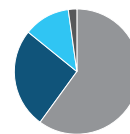
Preferred  
Portfolio  
100



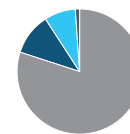
Preferred  
Portfolio  
80



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 |
| Vanguard Value Index    | 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 |

|              |             |             |             |             |             |             |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <b>Total</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|