



WM PREFERRED MANAGED PORTFOLIOS

More Aggressive
More Conservative

OBJECTIVE

ALLOCATION

PORTFOLIO EXPENSES¹

PORTFOLIO 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.

- U.S. Equity 65%
- Int'l Equity 30%
- Real Estate 5%

0.35%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	3.97%	20.09%	6.27%	11.44%	5.77%
Benchmarks	4.02%	19.18%	6.50%	10.68%	5.20%

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.

- U.S. Equity 51%
- Int'l Equity 24%
- Bonds 20%
- Real Estate 5%

0.30%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	3.22%	16.10%	5.58%	9.64%	5.97%
Benchmarks	3.24%	15.34%	5.74%	8.98%	5.22%

Portfolio 60

This portfolio is suitable for someone who is nearing retirement or someone who has a moderate risk tolerance.

- Bonds 40%
- U.S. Equity 39%
- Int'l Equity 18%
- Real Estate 3%

0.28%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	2.69%	11.90%	5.03%	7.88%	6.01%
Benchmarks	2.59%	11.47%	4.86%	7.27%	4.89%

Portfolio 40

This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.

- Bonds 60%
- U.S. Equity 26%
- Int'l Equity 12%
- Real Estate 2%

0.24%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	2.08%	7.95%	4.35%	6.02%	5.79%
Benchmarks	1.92%	7.83%	3.95%	5.45%	4.54%

Portfolio 20

This portfolio is suitable for someone who is nearing retirement or someone who has a low risk tolerance.

- Bonds 80%
- U.S. Equity 11%
- Int'l Equity 8%
- Real Estate 1%

0.19%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	1.56%	4.33%	3.47%	3.96%	5.21%
Benchmarks	1.34%	4.29%	3.03%	3.55%	4.20%

Portfolio Income

This portfolio is suitable for someone who is in retirement or someone who has a very low risk tolerance.

- Bonds 100%

0.13%

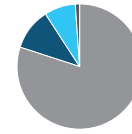
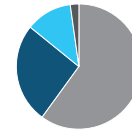
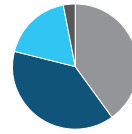
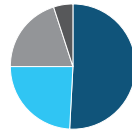
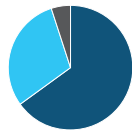
	3 Mo.	1 Yr.	3 Yr.	5 Yr.	10 Yr.
Portfolio	1.01%	0.56%	2.58%	1.90%	4.41%
Benchmarks	0.80%	0.76%	2.20%	1.77%	3.86%

*Source: Morningstar & fi360 through March 31, 2017

¹ Portfolio Expenses (Net Expense Ratio) as Weighted Average Total

Note: Portfolio returns are reported net of all internal expense ratio fees. Returns are not net of any management or fiduciary fees. 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



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	20	30	35	50
DFA Five-Year Global Fixed-Income	0	0	20	30	30	25
DFA Inflation Protection Security	0	0	0	0	15	25

Total	100%	100%	100%	100%	100%	100%
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