



WM PARTNER MANAGED PORTFOLIOS

More Aggressive

More Conservative

OBJECTIVE

ALLOCATION

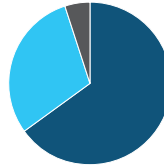
PORTFOLIO EXPENSES[†]

PORTFOLIO PERFORMANCE^{*}

Partner 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%



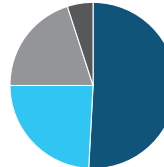
0.23%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	22.53%	0.13%	4.63%	6.16%
Benchmarks	21.06%	1.04%	6.12%	7.32%

Partner 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%



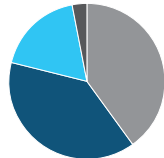
0.24%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	17.48%	0.53%	4.24%	5.48%
Benchmarks	16.71%	2.04%	5.78%	6.53%

Partner Portfolio 60

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

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



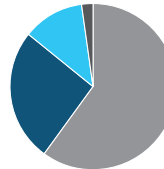
0.28%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	14.03%	2.05%	4.34%	5.14%
Benchmarks	13.03%	3.81%	5.76%	6.02%

Partner Portfolio 40

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

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



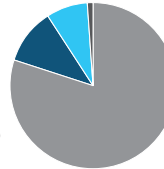
0.30%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	10.32%	3.20%	4.31%	4.70%
Benchmarks	9.21%	4.83%	5.34%	5.21%

Partner Portfolio 20

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

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



0.27%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	6.89%	4.66%	4.26%	4.10%
Benchmarks	5.90%	5.93%	4.93%	4.36%

Partner Portfolio Income

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

■ Bonds	100%
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0.26%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	2.95%	5.03%	3.74%	3.19%
Benchmarks	2.04%	6.23%	4.14%	3.21%

*Source: Morningstar & FiRM through June 30, 2020

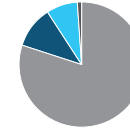
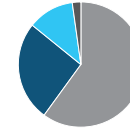
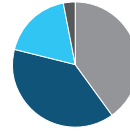
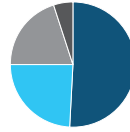
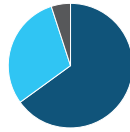
[†] Portfolio Expenses (Net Expense Ratio) as Weighted Average Total

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



WM PARTNER MANAGED PORTFOLIOS

RETIREMENT PLAN
CONSULTANTS
POWERED BY WEALTH MANAGEMENT^{LLC}



Partner Portfolio 100	Partner Portfolio 80	Partner Portfolio 60	Partner Portfolio 40	Partner Portfolio 20	Partner Portfolio Income
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Domestic Equity						
Columbia Large Cap Enhanced Core	16	12	10	7	3	0
JP Morgan Large Cap Value R6	6	5	4	2	1	0
Vanguard Growth Index	21	17	12	8	4	0
Vanguard Small Cap Growth	5	4	3	2	1	0
Vanguard Small Cap Value	17	13	10	7	4	0
International Developed Equity						
Vanguard Int'l Value	6	5	4	2	1	0
Vanguard Total International Stock Market	8	6	5	3	2	0
DFA International Small Cap	12	10	7	5	2	0
Emerging Markets						
DFA Emerging Markets Core	4	3	2	2	1	0
Real Estate Securities						
Vanguard REIT	5	5	3	2	1	0
Fixed Income						
DFA Five-Year Global Fixed-Income	0	20	20	30	30	50
Dodge & Cox Income	0	0	20	30	30	25
Vanguard Inflation Protection Security	0	0	0	0	20	25
Total	100%	100%	100%	100%	100%	100%

Fiduciary and investment advisory services are provided by Wealth Management LLC, Registered Investment Advisor.