



WM PARTNER MANAGED PORTFOLIOS

More Aggressive
More Conservative

OBJECTIVE

ALLOCATION

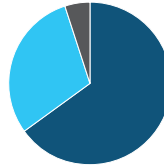
PORTFOLIO EXPENSES¹

PORTFOLIO PERFORMANCE¹

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%



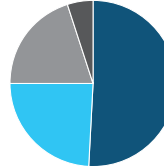
0.23%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	7.67%	8.00%	5.66%	9.62%
Benchmarks	7.96%	8.71%	6.95%	10.85%

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%



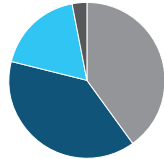
0.24%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	6.27%	6.78%	5.07%	8.17%
Benchmarks	6.40%	7.98%	6.45%	9.27%

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%



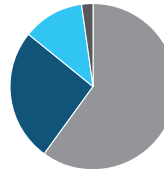
0.28%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	5.03%	6.76%	4.99%	7.25%
Benchmarks	4.94%	7.97%	6.24%	8.05%

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%



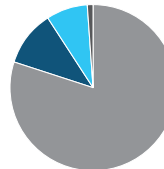
0.30%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	3.73%	6.27%	4.79%	6.17%
Benchmarks	3.47%	7.26%	5.64%	6.54%

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	2.70%	6.37%	4.64%	5.03%
Benchmarks	2.42%	7.10%	5.20%	5.15%

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	1.22%	5.01%	3.91%	3.42%
Benchmarks	1.03%	5.86%	4.28%	3.36%

*Source: Morningstar & Fi360 through September 30, 2020

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 advisory fees.