



# WM PARTNER MANAGED PORTFOLIOS

More Aggressive  
More Conservative

	OBJECTIVE	ALLOCATION	PORTFOLIO EXPENSES <sup>1</sup>	PORTFOLIO PERFORMANCE <sup>*</sup>															
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.	<ul style="list-style-type: none"> <li>U.S. Equity 65%</li> <li>Int'l Equity 30%</li> <li>Real Estate 5%</li> </ul>	0.22%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>7.56%</td> <td>67.47%</td> <td>13.19%</td> <td>14.22%</td> </tr> <tr> <td>Benchmarks</td> <td>7.00%</td> <td>64.89%</td> <td>13.83%</td> <td>14.70%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	7.56%	67.47%	13.19%	14.22%	Benchmarks	7.00%	64.89%	13.83%	14.70%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	7.56%	67.47%	13.19%	14.22%															
Benchmarks	7.00%	64.89%	13.83%	14.70%															
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.	<ul style="list-style-type: none"> <li>U.S. Equity 51%</li> <li>Int'l Equity 24%</li> <li>Bonds 20%</li> <li>Real Estate 5%</li> </ul>	0.23%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>5.99%</td> <td>51.71%</td> <td>11.34%</td> <td>11.79%</td> </tr> <tr> <td>Benchmarks</td> <td>5.45%</td> <td>49.51%</td> <td>11.87%</td> <td>12.20%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	5.99%	51.71%	11.34%	11.79%	Benchmarks	5.45%	49.51%	11.87%	12.20%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	5.99%	51.71%	11.34%	11.79%															
Benchmarks	5.45%	49.51%	11.87%	12.20%															
Partner Portfolio 60	This portfolio is suitable for someone who has a moderate risk tolerance.	<ul style="list-style-type: none"> <li>Bonds 40%</li> <li>U.S. Equity 39%</li> <li>Int'l Equity 18%</li> <li>Real Estate 3%</li> </ul>	0.27%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>4.04%</td> <td>39.20%</td> <td>9.91%</td> <td>9.98%</td> </tr> <tr> <td>Benchmarks</td> <td>3.40%</td> <td>35.84%</td> <td>10.20%</td> <td>10.01%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	4.04%	39.20%	9.91%	9.98%	Benchmarks	3.40%	35.84%	10.20%	10.01%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	4.04%	39.20%	9.91%	9.98%															
Benchmarks	3.40%	35.84%	10.20%	10.01%															
Partner Portfolio 40	This portfolio is suitable for someone who has a low risk tolerance.	<ul style="list-style-type: none"> <li>Bonds 60%</li> <li>U.S. Equity 26%</li> <li>Int'l Equity 12%</li> <li>Real Estate 2%</li> </ul>	0.29%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>2.23%</td> <td>26.65%</td> <td>8.07%</td> <td>7.78%</td> </tr> <tr> <td>Benchmarks</td> <td>1.66%</td> <td>23.34%</td> <td>8.18%</td> <td>7.61%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	2.23%	26.65%	8.07%	7.78%	Benchmarks	1.66%	23.34%	8.18%	7.61%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	2.23%	26.65%	8.07%	7.78%															
Benchmarks	1.66%	23.34%	8.18%	7.61%															
Partner Portfolio 20	This portfolio is suitable for someone who has a low risk tolerance.	<ul style="list-style-type: none"> <li>Bonds 80%</li> <li>U.S. Equity 11%</li> <li>Int'l Equity 8%</li> <li>Real Estate 1%</li> </ul>	0.27%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>0.49%</td> <td>15.81%</td> <td>6.44%</td> <td>5.63%</td> </tr> <tr> <td>Benchmarks</td> <td>0.03%</td> <td>13.07%</td> <td>6.40%</td> <td>5.37%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	0.49%	15.81%	6.44%	5.63%	Benchmarks	0.03%	13.07%	6.40%	5.37%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	0.49%	15.81%	6.44%	5.63%															
Benchmarks	0.03%	13.07%	6.40%	5.37%															
Partner Portfolio Income	This portfolio is suitable for someone who has a very low risk tolerance.	<ul style="list-style-type: none"> <li>Bonds 100%</li> </ul>	0.26%	<table border="1"> <thead> <tr> <th></th> <th>3 Mo.</th> <th>1 Yr.</th> <th>3 Yr.</th> <th>5 Yr.</th> </tr> </thead> <tbody> <tr> <td>Portfolio</td> <td>-0.97%</td> <td>4.39%</td> <td>4.07%</td> <td>2.97%</td> </tr> <tr> <td>Benchmarks</td> <td>-1.40%</td> <td>2.32%</td> <td>4.03%</td> <td>2.78%</td> </tr> </tbody> </table>		3 Mo.	1 Yr.	3 Yr.	5 Yr.	Portfolio	-0.97%	4.39%	4.07%	2.97%	Benchmarks	-1.40%	2.32%	4.03%	2.78%
	3 Mo.	1 Yr.	3 Yr.	5 Yr.															
Portfolio	-0.97%	4.39%	4.07%	2.97%															
Benchmarks	-1.40%	2.32%	4.03%	2.78%															

\*Source: Morningstar & FiRM through March 31, 2021

<sup>1</sup> 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.

