



WM PARTNER MANAGED PORTFOLIOS

More Aggressive

More Conservative

OBJECTIVE

ALLOCATION

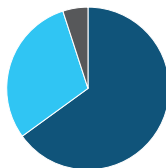
PORTFOLIO EXPENSES[†]

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%



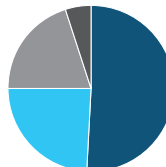
0.23%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	7.43%	47.41%	15.73%	15.89%
Benchmark	7.54%	46.47%	15.28%	16.00%

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%



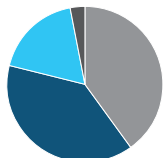
0.23%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	6.00%	36.76%	13.28%	13.04%
Benchmark	6.08%	35.90%	13.01%	13.20%

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%



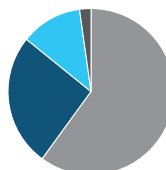
0.27%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	4.82%	27.64%	11.54%	10.88%
Benchmark	4.87%	26.02%	11.18%	10.71%

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%



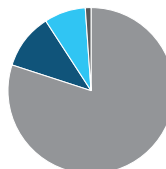
0.30%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	3.60%	18.58%	9.29%	8.32%
Benchmark	3.53%	16.92%	8.94%	8.03%

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%



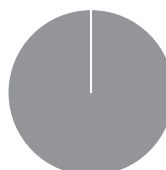
0.27%

	3 Mo.	1 Yr.	3 Yr.	5 Yr.
Portfolio	2.73%	11.04%	7.28%	5.87%
Benchmark	2.68%	9.62%	7.03%	5.60%

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	1.36%	2.75%	4.41%	2.91%
Benchmark	1.30%	1.58%	4.38%	2.77%

*Source: Morningstar & FiRM through June 30, 2021

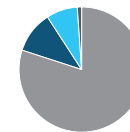
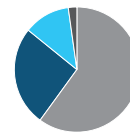
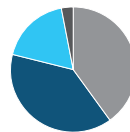
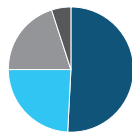
[†] Portfolio Expenses (Net Expense Ratio) as Weighted Average Total

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 LLC **POWERED BY**
WEALTH MANAGEMENT LLC
 A REGISTERED INVESTMENT ADVISOR



Partner Portfolio 100	Partner Portfolio 80	Partner Portfolio 60	Partner Portfolio 40	Partner Portfolio 20	Partner Portfolio Income
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Domestic Equity						
JP Morgan US Equity	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 International 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.