AGGRESSIVE TARGET MODEL

Aggressive Model Returns, 1979 – 2014

The ranges of returns displayed represent the highest and lowest returns generated for the Aggressive Model at different intervals. The highs and lows displayed are the extremes, and it’s more likely that your returns will fall somewhere inside the range if you adopt the asset allocation of this model.

The data indicates that the range of returns becomes narrower over time because time may play a role in decreasing the volatility associated with the model. It’s important to note, however, that decreased volatility is the result of maintaining the target model’s asset allocation over time through rebalancing.

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All returns displayed are based on rolling periods. Returns were calculated based on the asset allocation of each target model and use the following underlying benchmarks to represent the market segments within each model: Russell 1000 Index (U.S. Large Cap), Russell Mid Cap Index (U.S. Mid Cap), Russell 2000 Index (U.S. Small Cap), Morgan Stanley Capital International Europe, Australia & Far East (MSCI EAFE) Index (International Equity), Barclays Capital U.S. Aggregate Bond Index (Fixed Income Funds), and Bank of America - Merrill Lynch US Treasury Bill 3 Month Index (Cash Equivalents). Adopting the strategy of a target model does not guarantee that your returns will fall within the given range displayed for that model.

Past results should not be viewed as an indication of future performance.