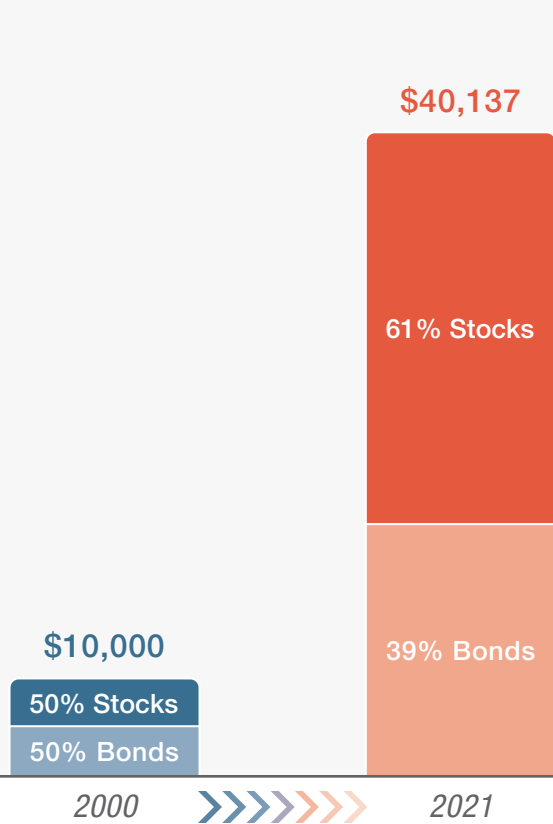
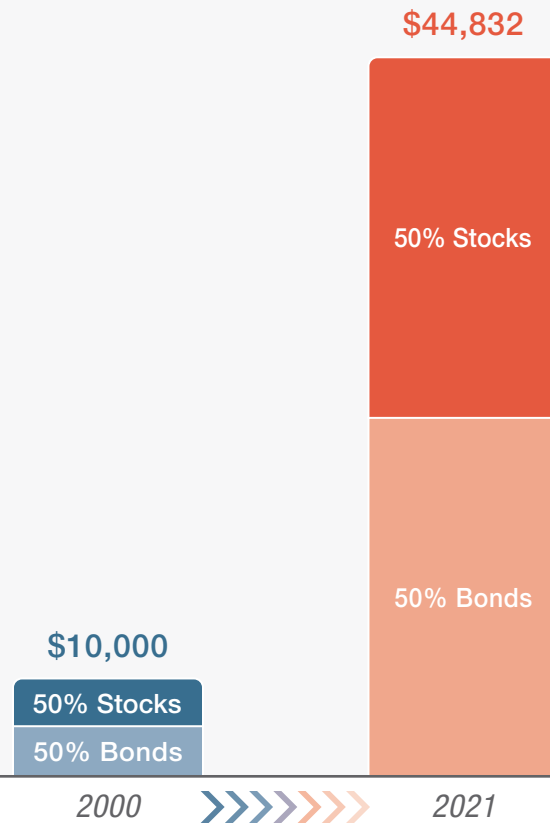


Asset Allocation
Balancing Act, 2000 – 2021



Without rebalancing

Annualized Return 6.5%
Risk 6.2%



With rebalancing

Annualized Return 7.1%
Risk 7.0%

This chart is for illustrative purposes only. It does not constitute investment advice and must not be relied on as such. Assumes reinvestment of all income and no transaction costs or taxes. An investment cannot be made directly in an index. Returns are compound annual returns. Risk is measured by the volatility (standard deviation) of returns. Sources: Stocks data: CRSP Value-Weighted Index of the S&P 500 Universe—Center for Research in Security Prices (CRSP), Bonds: USA 10-Year Government Bond Total Return Index—Global Financial Data, Inc. The reproduction of part or all of this publication without prior written consent from Investments Illustrated, Inc. is prohibited. The Investments Illustrated name and logo are registered trademarks. **Past performance is not an indicator of future performance.** © 2022 Investments Illustrated, Inc. All Rights Reserved.