



Portfolio Inception Date - Moderate:	1/1/2010							
Portfolio Inception Date - Agg/Con/Low:	7/18/2014							
Portfolio Inception Date - Keep Grundy Growing	2/7/2020							
Performance as of Date:	12/31/2024							
		QTR Ending	YTD	2023	TWR Annualized Since Inception			
					2/7/2020	7/18/2014	1/1/2010	
Actual Performance - After-Fees								
Moderate (60/40)		-2.11%	9.30%	13.27%			6.39%	
Aggressive (80/20)		-2.02%	11.60%	15.91%		6.88%		
Conservative (20/80)		-2.36%	5.40%	8.67%		2.72%		
Low Risk (0/100)		-2.70%	3.31%	6.14%		1.15%		
Keep Grundy Growing (60/40)		-1.99%	9.74%	13.52%	5.92%			
S&P 500 Index		3.37%	25.02%	26.29%	14.35%	13.11%	13.95%	
MSCI ACWI		-0.30%	17.48%	22.20%	10.74%	8.91%	9.45%	
Russell 2000		1.83%	11.54%	16.93%	8.06%	8.16%	10.49%	
MSCI EAFE		-7.60%	3.81%	18.24%	7.09%	5.07%	5.94%	
Bloomberg US Agg		-3.35%	1.25%	5.53%	-0.08%	1.82%	2.63%	
60% MSCI ACWI / 40% Bloomberg Agg		-1.52%	10.99%	15.53%	6.41%	6.07%	6.72%	
80% MSCI ACWI / 20% Bloomberg Agg		-0.91%	14.23%	18.87%	8.58%	7.49%	8.09%	
20% MSCI ACWI / 80% Bloomberg Agg		-2.74%	4.50%	8.86%	2.08%	3.24%	3.99%	

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