

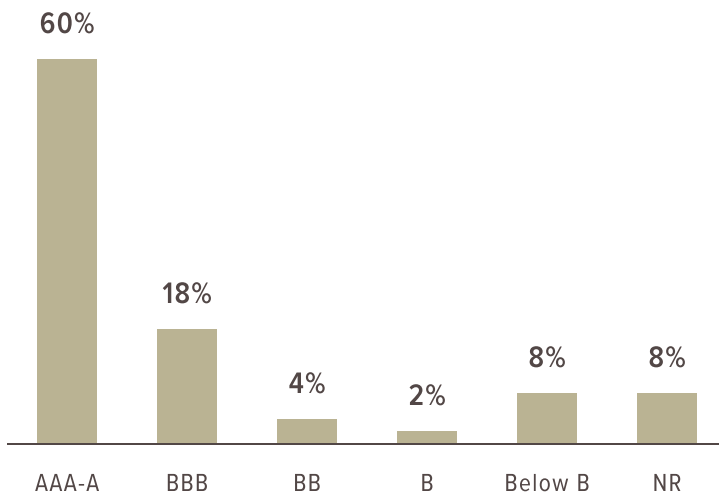
The Approach

The Fixed Income Portfolio seeks to generate current income by investing in a diversified set of debt securities with exposures to various currencies, term structures, issuers, collateralization structures and economic sectors. The portfolio is also diversified globally among both developed and emerging market countries.

The Features

The investment objective of the portfolio is current income with a secondary goal of capital appreciation. The portfolio has a flexible mandate, with no constraints on credit quality, duration, geographic region or issuers.

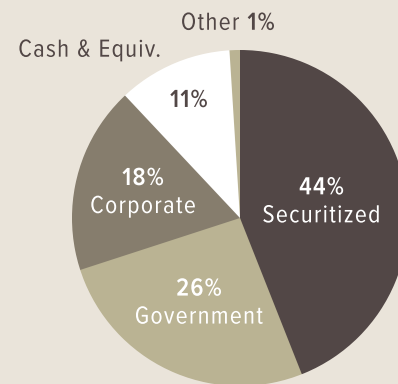
Credit Quality



Key Facts

Assets Managed — \$47 Million
Holdings — 11
Min Investment — \$25,000
Benchmark — Blended Bond Index*

Allocation



Top 5 Holdings (% weight)

Goldman Sachs Core Plus Bond	14.7%
JP Morgan Core Plus Bond ETF	14.6%
DoubleLine Total Return Bond	12.2%
River Canyon Total Return Bond	9.9%
JP Morgan Ultrashort Income ETF	9.7%

* Blended Bond Index: 65% Barclays US Agg; 20% Barclays US High Yield; 7.5% JP Morgan EM Debt USD; 7.5% JP Morgan EM Debt Local

Sources: Addepar as of June 2023; Bloomberg as of June 2023; Morningstar as of June 2023

Morningstar Portfolio Dates: 03/31/2023 - GSNIX, RCTIX, PELBX, VEGBX, RCIRX, FDBIX; 05/31/2023 - DBLTX; 07/12/2023 - JCPB; 07/13/2023 - JPST, STIP, GOVT

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