

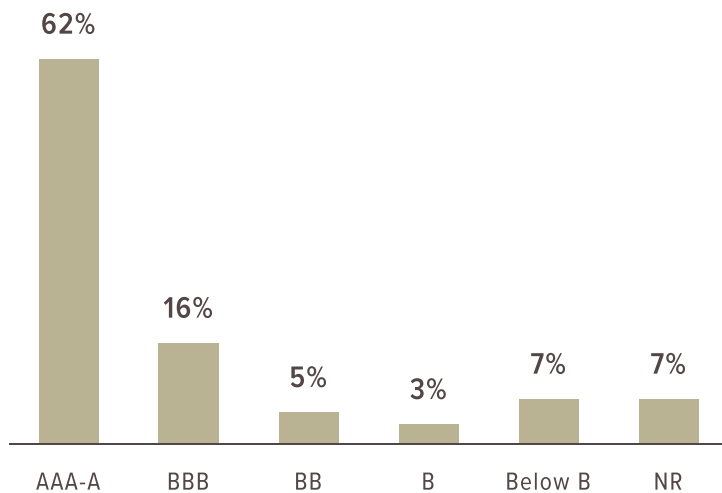
The Approach

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.

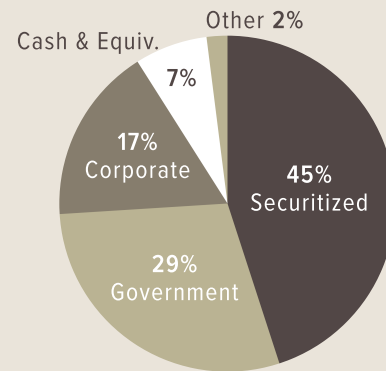
Credit Quality



Key Facts

Assets Managed — \$63 Million
Holdings — 11
Min Investment — \$25,000
Benchmark — Blended Bond Index*

Allocation



Top 5 Holdings (% weight)

JP Morgan Core Plus Bond ETF	16.0%
Goldman Sachs Core Bond Fund	16.0%
River Canyon Total Return Fund	12.6%
DoubleLine Total Return Bond	12.2%
PIMCO Emerging Market Local Debt Fund	7.8%

* 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 Dec. 2023; Bloomberg as of Dec. 2023; Morningstar as of Dec. 2023

Morningstar Portfolio Dates: 09/30/2023 - FDBIX, GSNIX, PELBX, RCIRX, RCTIX, VEGBX; 11/30/2023 - DBLTX; 01/10/2024 - GOVT, STIP, TLH; 01/11/2024 - JCPB.

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