



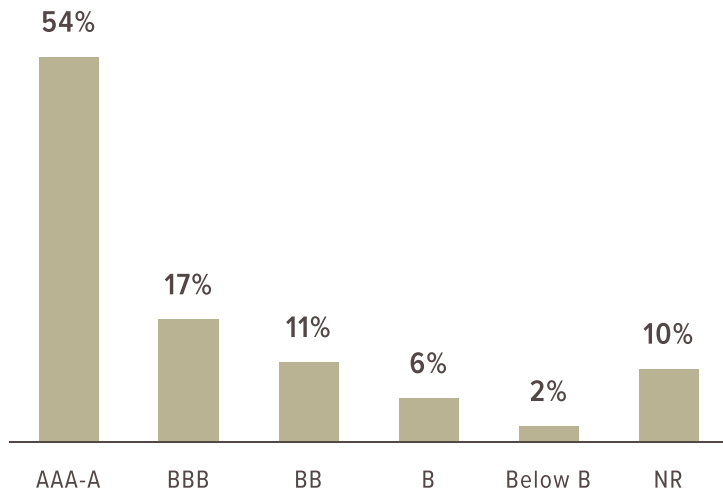
The Approach

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.

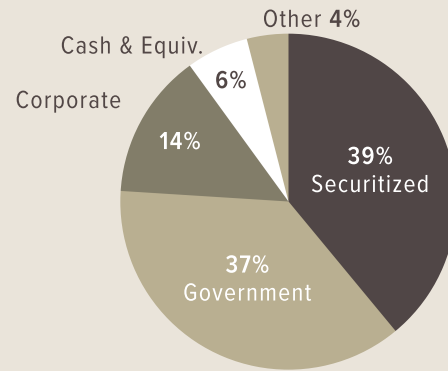
Credit Quality



Key Facts

Assets Managed — \$143 Million
 Holdings — 11
 Min Investment — \$25,000

Allocation



Top 5 Holdings (% weight)

Goldman Sachs Core Bond Fund	13.0%
BlackRock Total Return Fund	13.0%
JPMorgan Core Plus Bond ETF	12.9%
River Canyon Total Return Fund	11.9%
iShares Oct. 2034 TIPS ETF	10.1%

Sources: Addepar as of Mar. 2025; Morningstar as of Mar. 2025

Morningstar Portfolio Dates: 12/31/2024 - PELBX, RCTIX; 1/31/2025 - MAHQX, SEMMX, VEGBX; 2/28/2025 - GSNIX, JMSIX, VCFIX;

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