

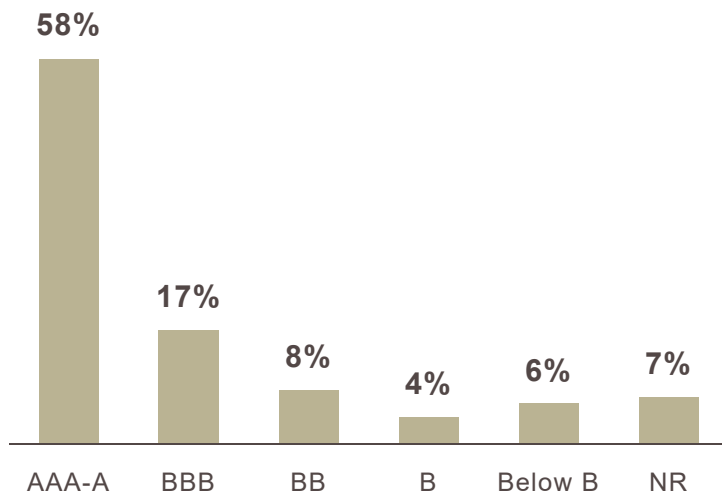
## The Approach

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



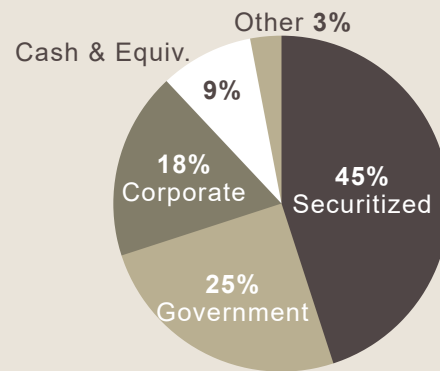
## Key Facts

Assets Managed — \$78 Million

Holdings — 12

Min Investment — \$25,000

## Allocation



## Top 5 Holdings (% weight)

Goldman Sachs Core Bond Fund	15.0%
JP Morgan Core Plus Bond ETF	14.9%
BlackRock Total Return Bond Fund	12.5%
River Canyon Total Return Fund	12.5%
Vanguard Emerging Market Debt Fund	6.1%

Sources: Addepar as of Mar. 2024; Morningstar as of Mar. 2024

Morningstar Portfolio Dates: 12/31/2023 - GSNIX, MAHQX, PELBX, PMZIX  
 RCTIX VEGBX; 1/31/2024 - JMSIX; 2/29/2024 - VCFIX; 3/27/2024 - GOVT,  
 JCPB, TLH; 3/28/2024 - PYLD

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