

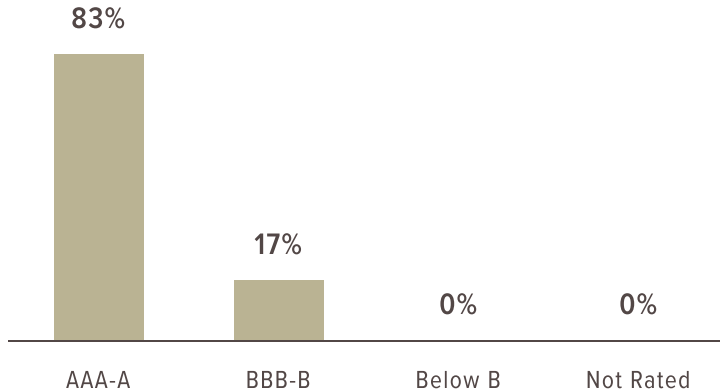
The Approach

The Short Duration portfolio seeks to generate current income by investing in a diversified set of low duration mutual funds 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 capital preservation with a secondary goal of current income. The portfolio has a flexible mandate, with no constraints on credit quality, duration, geographic region or issuers.

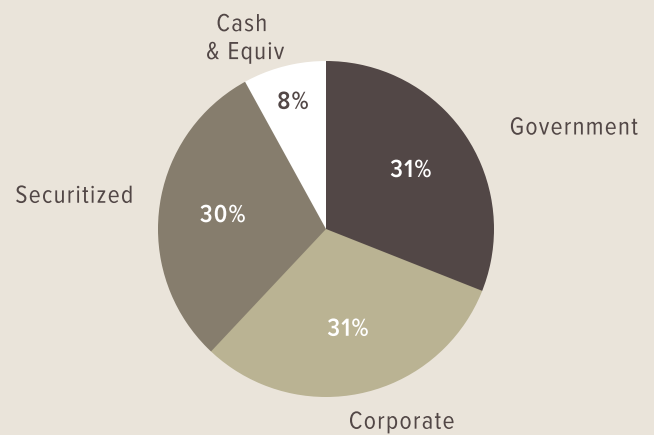
Credit Quality



Key Facts

Assets Managed — \$118 Million
Holdings — 8
Current Yield — 1.8%
Effective Duration — 1.4
Min Investment — \$10,000
Benchmark — Barclays US Aggregate 1-3 Year Index

Allocation



Top 5 Holdings (%)

Vanguard Short Term Treasury ETF	22.5%
Invesco Variable Rate Investment Grade ETF	16.3%
Goldman Sachs Ultra Short Bond ETF	15.9%
JP Morgan Ultra-Short Income ETF	15.8%
First Trust Low Duration Opportunities ETF	12.8%

Source: 2020 Addepar; 2020 Morningstar

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