

LifeGoal

Investments



Historical Performance Multi-Asset Since 1976

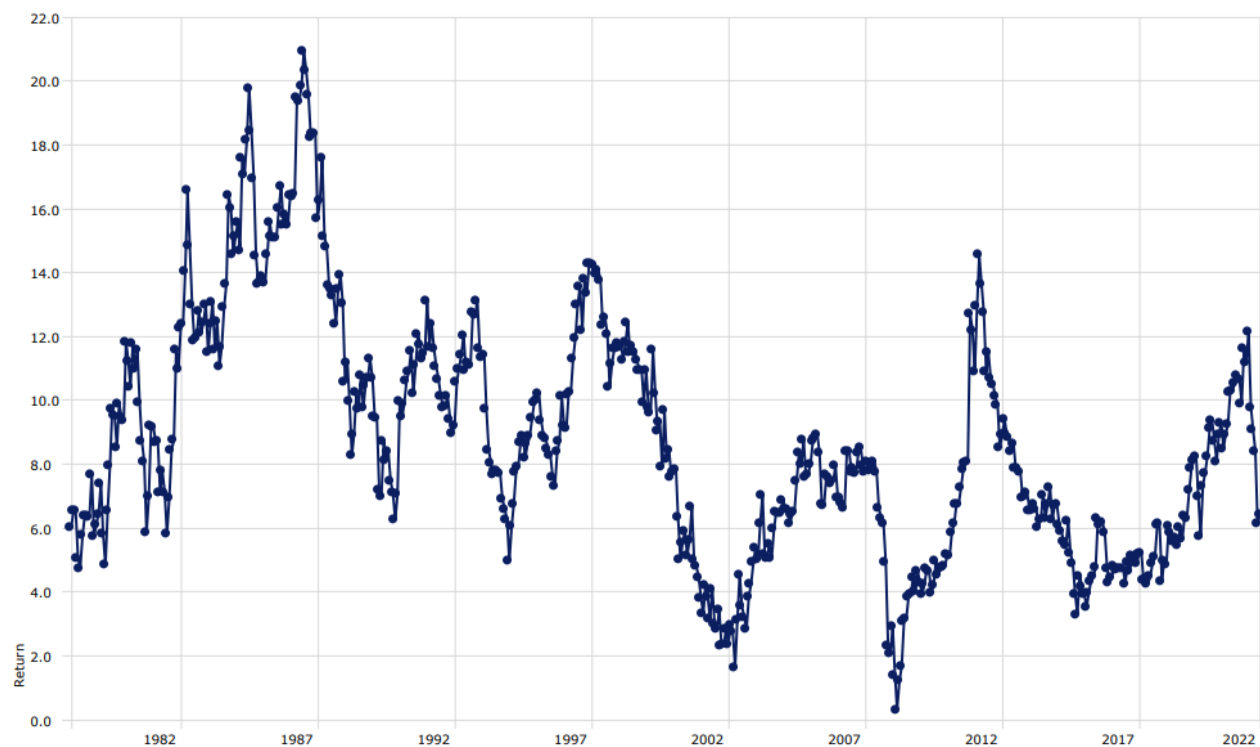
Buy & Hold for 3 Years = Positive Returns Since 1976.

- 100% of the time this Multi-Asset blend produced POSITIVE RETURNS when bought and held for a 3-year period.
- Chart shows 522 data points: each represents a 3-Year Period going back to 1976- every period had positive returns.

Performance Since 1976 = 8.54%/year

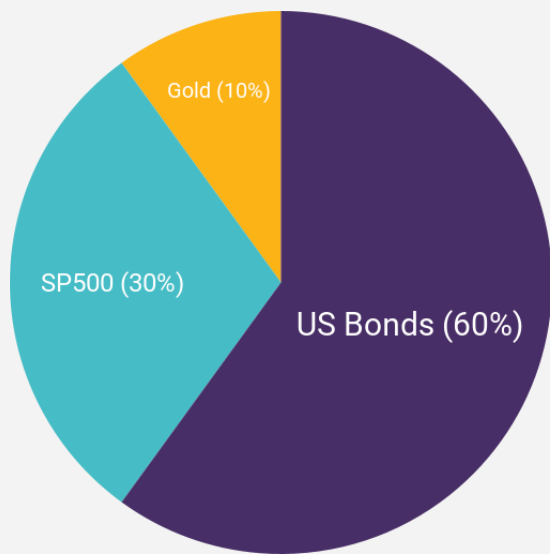
Time Period: Since Common Inception (1/1/1976) to 5/31/2022.

Rolling Window: 3 Years 1 Month shift.



Source: Morningstar Direct

Average Annual Performance Since 1976 is 8.54%/year



1/1/1976 to 5/31/2022

Portfolio Asset Allocation
(Rebalanced Quarterly)

60% Bonds / 30% SP500 / 10% Gold

Key Performance Details

- Average Annual Performance: 8.54%
- Standard Deviation (Volatility Statistic = 6.24%)
- # of 3 Year periods with a negative 3-year investment return = 0 (0 out of 522 Periods)
- 100% of the time the returns were positive if given at least 3 years.

Past performance is no guarantee of future results. For Illustrative Purposes Only.