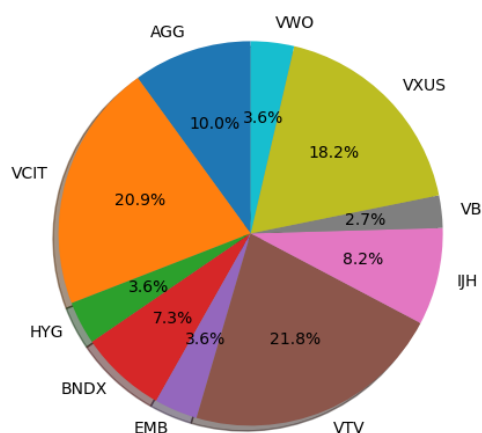


Portfolio Report for John Smith

Thank you for trusting our team with your information. We believe that this report will be beneficial and assist you on your financial journey. In the pages that follow, you will find educational material custom tailored to your risk tolerance, investment horizon, and preferred investment strategy. Our investment advisor will follow up with you in a couple of days to answer any questions that you have and assist you in implementing your investment plan. Welcome to the JACK Investment family.

In the pages that follow, you will find your Risk Assessment Score, your Investment Horizon Score, and your Investment Strategy. This report has been created using cutting edge analysis to provide you with the best investment alternatives based upon your criteria. If any of the information in the chart to the right is incorrect, please notify your account representative as this report is created using this financial and investment data.

Full Name:	John Smith
Phone Number:	7135551212
Email:	john_smith@gmail.com
Annual Income	500000.0
Income Stability	YES
Annual Expenses	150000.0
Investment Amount:	75000.0
Risk Tolerance	High
Investment Time Horizon	10+
Investment Strategy	Growth



To the left, you will see a pie chart that shows the percentage of the custom portfolio created for you by our system. The ETFs in this chart are blended together to meet your risk tolerance as well as your financial data. The composition of this portfolio is based on traditional stock market allocations. In the pages that follow, we will show you how this portfolio has performed in the past relative to the market as a whole and how simulations predict it will react for your time horizon.

Past performance is not a guarantee of future return, nor is it necessarily indicative of future performance. Keep in mind investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money. You should take independent financial advice from a professional in connection with, or independently research and verify, any information that you review.

Asset Class	Profile 0 Fixed Income	Profile 1	Profile 2	Profile 3	Profile 4	Profile 5 Speculative
Cash & Cash Alternatives	2%	2%	2%	2%	2%	2%
Fixed Income	98%	78%	58%	38%	18%	NA
Equity: Large Cap	NA	12%	18%	24%	32%	38%
Equity: Mid Cap	NA	NA	6%	9%	10%	13%
Equity: Small Cap	NA	NA	NA	3%	6%	7%
Equity: Intl	NA	8%	16%	20%	26%	33%
Equity: Emerging Mkts	NA	NA	NA	4%	6%	7%
ETFs	AGG, VCIT, HYG, BNDX	AGG, VCIT, HYG, BNDX, VTV, VXUS	AGG, VCIT, HYG, BNDX, EMB, VTV, IJH, VB, VXUS, VWO	AGG, VCIT, HYG, BNDX, EMB, VTV, IJH, VB, VXUS, VWO	AGG, VCIT, HYG, BNDX, EMB, VTV, IJH, VB, VXUS, VWO	VTV, IJH, VB, VXUS, VWO

The table above shows the different profiles and how those portfolios distribute risk for the profiles. For example, the Fixed Income Profile has no equity portion in the portfolio while Portfolio 5 has almost exclusively equities.

The goal of creating these portfolios is to balance risk and return. As you can see here, the IEF fund (shown in blue) has significantly lower volatility than the QQQ (shown in green). But as we will see in our next chart, the QQQ's return has been significantly higher as well. By blending ETFs together, your broker at JACK financial can reduce volatility while improving your returns.

