***RetirementPortfolio.org*** Model Portfolio

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| --- | --- | --- |
| **Portfolio** | **Age Range** | **Account Type** |
| Index ETF Portfolio | {{ageRange}} | Retirement |

|  |  |
| --- | --- |
| **Rebalancing Frequency** | **Stock / Bond Ratio** |
| Monitor annually but only rebalance when the asset allocation has drifted outside preset percentage band (10%), first use portfolio cashflows then use asset sale. | {{ratio}} |

|  |  |  |  |
| --- | --- | --- | --- |
| **Allocation** | **Asset Class** | **Fund Name** | **Fund Expense Ratio** |
| {{allocation}} | {{assetClass}} | {{fundName}} | {{fundExpense}} |

|  |  |
| --- | --- |
| Total Portfolio Expense Ratio, excluding commissions or advisor fees: | {{totalfundExpense}} |

The information provided above is for educational purposes only and is not intended as specific investment advice for you. Fund expense ratios current as-of 9/2/2014. Model Portfolios provided courtesy of EISRC. EISRC and RetirementPortfolio.org are not providing or offering to provide services or advice to you, and will not be liable for any losses you may incur as a result of any investment decision made.