NATIONAL IRA: *Investment Worksheet*

You may use the results of your *Investor Suitability Profile Questionnaire* and corresponding portfolio suggestions or create your own to fill out the worksheet below. Your allocation must total 100%. For investment details, see the *Investment Spectrum*.

FIXED INCOME – LOW RISK/CORE

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	Pioneer Bond K • PBFKX		✔	
________	Guggenheim Limited Duration Insitutional • GILHX		✔	
________	Vanguard Treasury Money Market Investor • VUSXX		✔	

LARGE-CAP STOCK FUNDS – MODERATE RISK/CORE

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	Vanguard Equity Income Admiral • VEIRX		✔	
________	Vanguard Institutional Index Institutional Plus • VIIIX	✔		
________	Parnassus Core Equity Institutional • PRILX		✔	✔
________	Fidelity Contrafund (K6) • FLCNX		✔	
________	JPMorgan Large Cap Growth • JLGMX		✔	

MID-CAP STOCK FUNDS – GREATER RISK/SUPPORTING

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	T. Rowe Price Mid-Cap Value • TRMCX		✔	
________	Vanguard Mid-Cap Index Institutional• VMCIX	✔		
________	ClearBridge Select IS • LCSSX		✔	

INTERNATIONAL EQUITY FUNDS – GREATER RISK/CORE

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	Invesco Developing Markets (Institutional shares) • ODVIX			✔
________	JHancock International Growth R6 • JIGTX		✔	
________	Vanguard Total International Stock Index Admiral• VTIAX		✔	

SMALL-CAP STOCK FUNDS – GREATEST RISK/SUPPORTING

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	MFS New Discovery R6 • NDVVX		✔	
________	Vanguard Small-Cap Index Institutional• VSCIX	✔		
________	ClearBridge Small Cap Growth I • SBPYX		✔	

SPECIALTY FUND – GREATEST RISK/SPECIALIZED

Percentage	Name of fund	Index	Actively managed	Socially responsible
________	PIMCO All Asset Institutional • PAAIX		✔	
100%	**Total**			

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