

21 YEAR PERIODIC TABLE OF ASSET CLASS RETURNS (%)



ANNUAL TOTAL RETURNS % OF SELECTED INDICES AND LIPPER AVERAGES (1994-2014) IN ORDER OF PERFORMANCE (BEST TO WORST)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Best	Int'l 7.78	Lg Cap Value 38.36	S&P GS Com 33.92	Lg Cap Value 35.18	Lg Cap Growth 38.71	S&P GS Com 40.92	S&P GS Com 49.74	R2000 Val 14.02	S&P GS Com 32.07	R2000 Val 46.03	R2000 Val 22.25	S&P GS Com 25.53	Int'l 26.34	S&P GS Com 32.67	Fixed Income 5.24	Lg Cap Growth 37.21	R2000 Val 24.50	Lip TIPS 11.03	R2000 Val 18.05	R2000 Val 34.52	Lg Cap Value 13.45
	S&P GS Com 5.29	Lg Cap Growth 37.18	Lg Cap Growth 23.12	R2000 Val 31.78	MSCI World 24.34	Lg Cap Growth 33.16	R2000 Val 22.83	Fixed Income 8.44	Lip TIPS 15.01	Int'l 38.59	Int'l 20.25	Int'l 13.54	R2000 Val 23.48	Lg Cap Growth 11.81	Lip TIPS -4.14	Int'l 31.78	DJ Wil 5000 TM 17.87	Fixed Income 7.84	Lg Cap Value 17.51	Lg Cap Growth 33.48	Lg Cap Growth 13.05
	MSCI World 5.08	DJ Wil 5000 TM 36.45	Lg Cap Value 21.64	DJ Wil 5000 TM 31.29	DJ Wil 5000 TM 23.43	Int'l 26.96	Lip TIPS 12.27	Lip TIPS 7.23	Fixed Income 10.25	MSCI World 33.11	S&P GS Com 17.28	MSCI World 9.49	Lg Cap Value 22.25	Int'l 11.17	Div Port -27.82	MSCI World 29.99	Lg Cap Growth 16.71	Lg Cap Growth 2.64	Int'l 17.32	DJ Wil 5000 TM 32.71	Div Port 8.05
	Lg Cap Growth 2.62	Div Port 27.42	R2000 Val 21.37	Lg Cap Growth 30.49	Int'l 20.00	MSCI World 24.93	Fixed Income 11.63	Div Port -4.80	Div Port -9.86	DJ Wil 5000 TM 31.64	Lg Cap Value 16.49	Lg Cap Value 7.05	MSCI World 20.07	Lip TIPS 9.86	R2000 Val -28.92	DJ Wil 5000 TM 29.42	Lg Cap Value 15.51	Div Port -1.70	DJ Wil 5000 TM 16.12	Lg Cap Value 32.52	Fixed Income 5.97
	DJ Wil 5000 TM -0.06	R2000 Val 25.75	DJ Wil 5000 TM 21.21	Div Port 20.57	Div Port 17.01	DJ Wil 5000 TM 23.56	Lg Cap Value 7.01	Lg Cap Value -5.59	R2000 Val -11.43	Lg Cap Value 30.03	MSCI World 14.72	DJ Wil 5000 TM 6.32	DJ Wil 5000 TM 15.87	MSCI World 9.04	Lg Cap Value -36.85	Div Port 20.81	Div Port 12.99	DJ Wil 5000 TM 0.59	MSCI World 15.83	MSCI World 26.67	MSCI World 4.94
	Div Port -0.30	MSCI World 20.72	Div Port 13.58	MSCI World 15.76	Lg Cap Value 15.63	Div Port 13.60	Div Port -0.79	DJ Wil 5000 TM -10.97	Lg Cap Value -15.52	Lg Cap Growth 29.75	DJ Wil 5000 TM 12.62	Div Port 5.42	Div Port 13.04	Fixed Income 6.97	DJ Wil 5000 TM -37.34	R2000 Val 20.58	MSCI World 11.76	Lg Cap Value 0.39	Lg Cap Growth 15.26	Int'l 22.77	R2000 Val 4.21
	R2000 Val -1.54	S&P GS Com 20.33	MSCI World 13.48	Fixed Income 9.65	Fixed Income 8.69	Lg Cap Value 7.35	DJ Wil 5000 TM -10.89	MSCI World -16.82	Int'l -15.94	Div Port 23.47	Div Port 10.50	Lg Cap Growth 5.26	Lg Cap Growth 9.07	Div Port 6.04	Lg Cap Growth -38.44	Lg Cap Value 19.69	S&P GS Com 9.03	S&P GS Com -1.18	Div Port 12.21	Div Port 20.31	Lip TIPS 1.65
	Lg Cap Value -1.98	Fixed Income 18.47	Int'l 6.05	Lip TIPS 7.68	Lip TIPS 5.75	Lip TIPS 1.50	MSCI World -13.18	Lg Cap Growth -20.42	MSCI World -19.89	S&P GS Com 20.72	Lip TIPS 7.52	R2000 Val 4.71	Fixed Income 4.33	DJ Wil 5000 TM 5.73	MSCI World -40.71	S&P GS Com 13.48	Int'l 7.75	R2000 Val -5.50	Lip TIPS 6.52	S&P GS Com 0.00	S&P GS Com 0.00
	Fixed Income -2.92	Lip TIPS 15.95	Lip TIPS 5.27	Int'l 1.78	R2000 Val -6.45	Fixed Income -0.82	Int'l -14.17	Int'l -21.44	DJ Wil 5000 TM -20.86	Lip TIPS 7.10	Lg Cap Growth 6.30	Fixed Income 2.43	Lip TIPS 0.00	Lg Cap Value -0.17	Int'l -43.38	Lip TIPS 10.75	Fixed Income 6.54	MSCI World -5.54	Fixed Income 4.21	Fixed Income -2.02	Int'l -4.90
Worst	Lip TIPS -4.27	Int'l 11.21	Fixed Income 3.63	S&P GS Com -14.07	S&P GS Com -35.75	R2000 Val -1.49	Lg Cap Growth -22.42	S&P GS Com -31.93	Lg Cap Growth -27.88	Fixed Income 4.10	Fixed Income 4.34	Lip TIPS 1.78	S&P GS Com -15.08	R2000 Val -9.78	S&P GS Com -46.49	Fixed Income 5.93	5.84	Int'l -12.14	S&P GS Com 0.08	Lip TIPS -7.55	DJ Wil 5000 TM -9.85

- **Russell 1000 Value.** Measures the performance of those Russell 1000 companies with lower price-to-book ratios and lower forecasted growth values.
- **Russell 2000 Value.** Measures the performance of those Russell 2000 companies with lower price-to-book ratios and lower forecasted growth values.
- **Dow Jones Wilshire 5000 Total Market.** Represents the broadest index for the U.S. equity market, measuring the performance of all U.S. headquartered equity securities with readily available price data.
- **Russell 1000 Growth.** Measures the performance of those Russell 1000 companies with higher price-to-book ratios and higher forecasted growth values.
- **Barclays Capital U.S. Aggregate Bond Index.** Composed of the Barclays Capital Government/Corporate Bond Index and the Barclays Capital Mortgage-Backed Securities Index and includes Treasury issues, agency issues, corporate bond issues and mortgage-backed securities.
- **Lipper Treasury Inflation Protected Securities Funds Average.** Tracks funds that invest primarily in inflation-indexed fixed income securities issued in the United States. Inflation-indexed bonds are fixed income securities that are structured to provide protection against inflation.
- **MSCI EAFE.** An unmanaged index that measures the total returns of developed foreign stock markets in Europe, Asia and the Far East.
- **MSCI World.** Consists of a market-value-weighted average of the performance of more than 1,364 securities listed on the stock exchanges of the following countries: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Hong Kong, Ireland, Italy, Japan, the Netherlands, New Zealand, Norway, Portugal, Singapore, Spain, Sweden, Switzerland, the United Kingdom and the United States.
- **S&P Goldman Sachs Commodity Index TR.** Tracks investment performance in the commodity markets comparable to the S&P 500 or FT equity indices. As such, the S&P GSCI is a composite index of commodity sector returns, representing an unleveraged, long-only investment in commodity futures that is broadly diversified across the spectrum of commodities.
- **Standard Diversified Portfolio.** Comprised of 35% Barclays Capital Aggregate Bond, 10% Morgan Stanley Capital International (MSCI) EAFE, 10% Russell 2000, 22.5% Russell 1000 Growth, and 22.5% Russell 1000 Value.

Source: Lipper, Inc. and Morningstar. Performance information represents past performance and does not guarantee future results. The information provided is for illustrative purposes only and is not meant to represent the performance of any particular investment. Investing involves risk. Asset class returns are represented by the returns of indices and/or Lipper mutual fund averages and are ranked on an annual total return basis. It is not possible to invest directly in an index. Performance results assume reinvestment of distributions.

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