

# Portfolio Recommendation - {UserName}

Invest-it-Yourself.com

Asset Class	Portfolio		Symbol	Mutual Fund	ETF(s)
US Equity - Total Stock Market	\$14,850	24.8%	VTSMX	Vanguard Total Stock Market Index Fund	VTI
US Equity - Small Cap Value	\$4,950	8.3%	VISVX	Vanguard Small-Cap Value Index Fund	VBR, IJS
Int'l Equity - All-World ex-US	\$3,600	6%	VFWIX	Vanguard FTSE All-World ex-US Index Fund	VEU
Int'l Equity - Small Cap	\$3,600	6%	VFSVX	Vanguard FTSE All-World ex-US Small Cap	VSS
Int'l Equity - Value	\$3,600	6%	VTRIX	Vanguard International Value Fund	EFV
Bonds - Total Bond Market	\$15,000	25%	VBMFX	Vanguard Total Bond Market Index Fund	BND
Bonds - TIPS	\$9,000	15%	VIPSX	Vanguard Inflation-Protected Securites Fund	TIP
Real Estate - REITs	\$5,400	9%	VGSIX	Vanguard REIT Index Fund	VNQ
<b>Portfolio Total</b>	<b>\$60,000</b>	<b>100%</b>			

## Asset Class Breakdown

<b>US Equity</b>	<b>\$19,800</b>	<b>33%</b>
Total Stock Market	\$14,850	24.8%
Small Cap Value	\$4,950	8.3%

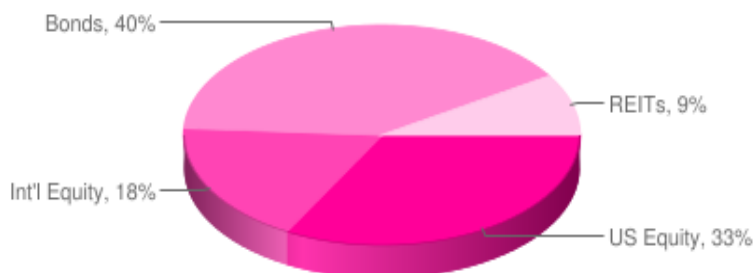
<b>Int'l Equity</b>	<b>\$10,800</b>	<b>18%</b>
Europe	\$4,716	7.9%
Pacific	\$3,204	5.3%
Emerging Markets	\$2,052	3.4%
North America	\$828	1.4%

<b>Bonds</b>	<b>\$24,000</b>	<b>40%</b>
Treasury/Mortgage Bonds	\$9,750	16.3%
Corporate Bonds	\$4,350	7.3%
Foreign Bonds	\$900	1.5%
TIPS	\$9,000	15%

<b>Real Estate (REITs)</b>	<b>\$5,400</b>	<b>9%</b>
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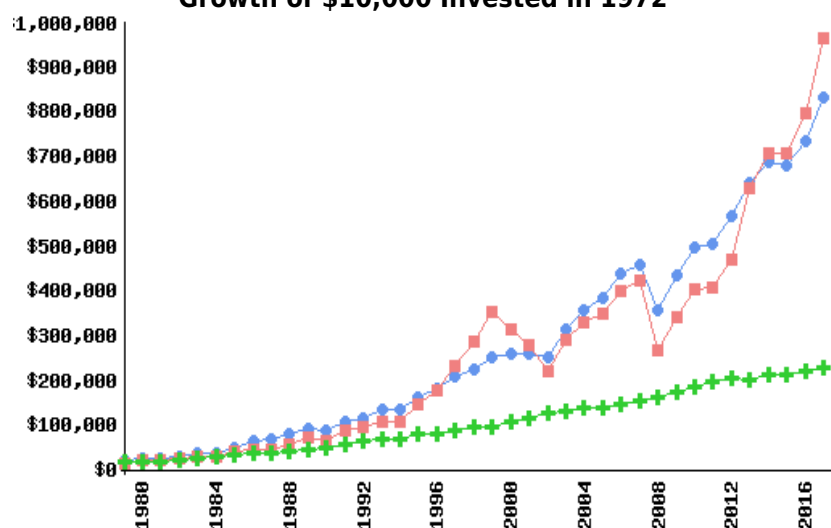
<b>Total</b>	<b>\$60,000</b>	<b>100%</b>
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Overall Asset Allocation



## Historical Performance<sup>1</sup>

Growth of \$10,000 Invested in 1972



Modeled Performance Statistics (1972-2017)

	Compound Annual Return	Standard Deviation (Volatility)	Highest Annual Return	Lowest Annual Return
<b>Recommendation</b>	<b>10.09%</b>	<b>10.60%</b>	<b>29.30%</b>	<b>-22.17%</b>
US Stock Market	10.44%	17.60%	38.51%	-37.04%
US Bond Market	7.02%	5.44%	25.20%	-2.66%