

# AFFILIATES IN ORAL AND

## Screens Summary (Data as of 03-31-2025)

🔴 Fund Removed from Approved List    🟡 Fund on Watch List

| Name                                     | Ticker | Asset Class               | Trailing Performance and Risk |       |       |       |               |                   |                | Management |               |              | Style         |              | Expense       |                    | ESG Metrics      |                |         |
|------------------------------------------|--------|---------------------------|-------------------------------|-------|-------|-------|---------------|-------------------|----------------|------------|---------------|--------------|---------------|--------------|---------------|--------------------|------------------|----------------|---------|
|                                          |        |                           | 1 Yr                          | 3 Yr  | 5 Yr  | 10 Yr | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |         |
|                                          |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
|                                          |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    | Updated          | Updated        | Updated |
| US Stock                                 |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| DFA US Core Equity 1 I                   | DFEOX  | Large Blend               | 5.26                          | 8.28  | 18.99 | 11.24 | ✔             | 17.86             | 1.02           | 13.10      | ✔             | 🗲            | ✔             | 0.15         | ✔             | 2                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 64                            | 47    | 14    | 52    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,457                         | 1,331 | 1,218 | 912   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| Vanguard 500 Index Admiral               | VFIAX  | Large Blend Index         | 8.21                          | 9.02  | 18.55 | 12.46 | ✔             | 17.31             | 1.00           | 7.34       | ✔             | 🗲            | ✔             | 0.04         | ✔             | 3                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 20                            | 24    | 24    | 8     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,457                         | 1,331 | 1,218 | 912   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |
| State St Russell Lg Cap Gr® Indx NL Cl C |        | Large Growth              | 7.74                          | 10.06 | 20.03 | 15.07 | ✔             | 20.48             | 1.00           | 25.76      | ✔             | 🗲            | ✔             | 0.04         | ✔             | 3                  | —                | Low Risk       |         |
| percentile rank                          |        |                           | 22                            | 18    | 12    | 8     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,103                         | 1,052 | 972   | 759   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| State St Russell Lg Cp Val® Indx NL Cl C |        | Large Value               | 7.12                          | 6.59  | 16.12 | 8.80  | ✔             | 17.00             | 1.00           | 26.11      | ✔             | 🗲            | ✔             | 0.04         | ✔             | 3                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 44                            | 59    | 60    | 55    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 1,175                         | 1,109 | 1,049 | 824   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| Vanguard Mid-Cap Growth Index Admiral    | VMGMX  | Mid-Cap Growth            | 4.49                          | 3.95  | 14.82 | 9.37  | ✔             | 21.38             | 0.96           | 2.12       | ✖             | 🗲            | ✔             | 0.07         | ✔             | 4                  | 1-Low            | Medium Risk    |         |
| percentile rank                          |        |                           | 7                             | 23    | 18    | 30    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 509                           | 493   | 459   | 369   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Mid-Cap Value Index Admiral     | VMVAX  | Mid-Cap Value             | 5.37                          | 4.81  | 17.24 | 8.21  | ✔             | 19.09             | 0.94           | 2.12       | ✖             | 🗲            | ✔             | 0.07         | ✔             | 4                  | 1-Low            | Medium Risk    |         |
| percentile rank                          |        |                           | 19                            | 45    | 52    | 35    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 424                           | 397   | 373   | 285   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |
| State St Russell Sm Cap® Gr Indx NL Cl C |        | Small Growth              | -4.83                         | 0.74  | 10.64 | 6.02  | ✔             | 23.83             | 1.00           | 15.58      | ✔             | 🗲            | ✔             | 0.05         | ✔             | 2                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 50                            | 47    | 70    | 81    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 559                           | 543   | 528   | 398   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| State St Russell Sm Cp® Val Indx NL Cl C |        | Small Value               | -3.16                         | -0.02 | 15.19 | 6.06  | ✔             | 23.90             | 1.00           | 15.58      | ✔             | 🗲            | ✔             | 0.05         | ✔             | 2                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 48                            | 85    | 81    | 61    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 503                           | 482   | 456   | 365   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| Non-US Stock                             |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| Vanguard Emerging Mkts Stock Idx Adm     | VEMAX  | Diversified Emerging Mkts | 11.18                         | 2.76  | 9.40  | 3.99  | ✔             | 16.08             | 0.90           | 16.60      | ✔             | 🗲            | ✔             | 0.13         | ✔             | 2                  | 1-Low            | Medium Risk    |         |
| percentile rank                          |        |                           | 10                            | 32    | 39    | 38    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 787                           | 724   | 646   | 439   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard Developed Markets Index Admiral | VTMGX  | Foreign Large Blend Index | 4.73                          | 5.31  | 12.15 | 5.60  | ✔             | 17.95             | 1.09           | 12.11      | ✔             | 🗲            | ✔             | 0.05         | ✔             | 3                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 75                            | 56    | 36    | 33    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 761                           | 706   | 662   | 445   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |
| Vanguard International Growth Adm        | VWILX  | Foreign Large Growth      | 5.46                          | 1.83  | 10.61 | 8.25  | ✔             | 22.22             | 1.21           | 15.27      | ✔             | 🗲            | ✔             | 0.25         | ✔             | 3                  | —                | Low Risk       |         |
| percentile rank                          |        |                           | 20                            | 60    | 36    | 6     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 392                           | 372   | 338   | 218   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| DFA International Value I                | DFIVX  | Foreign Large Value       | 11.13                         | 9.82  | 18.20 | 6.30  | ✔             | 17.68             | 1.00           | 15.10      | ✔             | 🗲            | ✔             | 0.28         | ✔             | 1                  | —                | Medium Risk    |         |
| percentile rank                          |        |                           | 40                            | 19    | 6     | 13    |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 369                           | 347   | 323   | 230   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |         |
| Vanguard Total World Stock Index Admiral | VTWAX  | Global Stock              | 6.90                          | 6.86  | 15.37 | —     | ✔             | 16.60             | 1.02           | 12.11      | ✔             | —            | ✔             | 0.09         | ✔             | 2                  | 1-Low            | Low Risk       |         |
| percentile rank                          |        |                           | 28                            | 43    | 30    | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |         |
| # of funds in category                   |        |                           | 324                           | 307   | 288   | 192   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |         |

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⊖ Fund Removed from Approved List    ⚠ Fund on Watch List

|                                          |        |                          | Trailing Performance and Risk |       |       |       |               |                   |                | Management |               |              | Style         |              | Expense       |                                      | ESG Metrics                        |                                  |  |
|------------------------------------------|--------|--------------------------|-------------------------------|-------|-------|-------|---------------|-------------------|----------------|------------|---------------|--------------|---------------|--------------|---------------|--------------------------------------|------------------------------------|----------------------------------|--|
| Name                                     | Ticker | Asset Class              | 1 Yr                          | 3 Yr  | 5 Yr  | 10 Yr | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating<br><i>Updated</i> | Commit.<br>Level<br><i>Updated</i> | Carbon<br>Risk<br><i>Updated</i> |  |
| Alternative                              |        |                          |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| Invesco Balanced-Risk Commodity Strat R6 | IBRFX  | Commodities Broad Basket | 5.77                          | 0.79  | 15.18 | 3.48  | 🟢             | 10.67             | 0.75           | 14.34      | 🟢             | —            | —             | 1.15         | 🟢             | —                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | 70                            | 24    | 56    | 50    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 110                           | 101   | 95    | 67    |               |                   |                |            |               |              |               |              |               | —                                    | —                                  | —                                |  |
| Vanguard Real Estate Index Admiral       | VGSLX  | Real Estate              | 9.00                          | -1.86 | 9.41  | 4.85  | 🟢             | 21.07             | 1.02           | 28.90      | 🟢             | —            | 🟢             | 0.13         | 🟢             | 2                                    | 1-Low                              | Low Risk                         |  |
| percentile rank                          |        |                          | 47                            | 52    | 61    | 50    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 229                           | 221   | 204   | 152   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | 12-31-2022                       |  |
| Fixed Income                             |        |                          |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| Loomis Sayles Core Plus Bond N           | NERNX  | Core Plus Bond           | 4.22                          | 0.61  | 0.72  | 2.13  | 🟢             | 8.58              | 1.11           | 28.27      | 🟢             | —            | —             | 0.39         | 🟢             | 3                                    | 1-Low                              | —                                |  |
| percentile rank                          |        |                          | 90                            | 64    | 59    | 24    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 583                           | 542   | 490   | 354   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | —                                |  |
| PIMCO International Bond (USD-Hdg) Instl | PFORX  | Global Bond              | 4.69                          | 2.80  | 2.17  | 2.69  | 🟢             | 4.95              | 0.54           | 10.52      | 🟢             | —            | —             | 0.75         | 🟢             | 3                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | 42                            | 12    | 13    | 7     |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 109                           | 104   | 99    | 60    |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| ⚠ Vanguard High-Yield Corporate Adm      | VWEAX  | High Yield Bond          | 7.22                          | 4.68  | 6.10  | 4.55  | 🟢             | 8.16              | 0.97           | 2.59       | 🔴             | —            | —             | 0.12         | 🟢             | 2                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | 32                            | 38    | 70    | 29    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 632                           | 600   | 551   | 434   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| Vanguard Inflation-Protected Secs Adm    | VAIPX  | Inflation-Protected Bond | 6.24                          | -0.08 | 2.25  | 2.41  | 🟢             | 7.24              | 1.00           | 3.39       | 🟢             | —            | —             | 0.10         | 🟢             | 3                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | 36                            | 50    | 53    | 35    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 158                           | 150   | 141   | 117   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| Baird Aggregate Bond Inst                | BAGIX  | Intermediate-Term Bond   | 5.22                          | 1.03  | 0.37  | 1.86  | 🟢             | 7.75              | 1.01           | 24.52      | 🟢             | 🟡            | —             | 0.30         | 🟢             | 4                                    | 1-Low                              | —                                |  |
| percentile rank                          |        |                          | 28                            | 21    | 27    | 16    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 529                           | 470   | 423   | 294   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | —                                |  |
| Lincoln Stable Value Account -LNGPA      |        | Stable Value             | —                             | —     | —     | —     | —             | —                 | —              | 41.94      | 🟢             | —            | —             | —            | —             | —                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | —                             | —     | —     | —     |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 10                            | —     | —     | —     |               |                   |                |            |               |              |               |              |               | —                                    | —                                  | —                                |  |
| Federated Hermes Govt Ultrashort R6      | FGULX  | Ultrashort Bond          | 5.45                          | 4.30  | 2.75  | —     | 🟢             | 0.83              | 0.07           | 27.74      | 🟢             | —            | —             | 0.24         | 🟢             | —                                    | —                                  | —                                |  |
| percentile rank                          |        |                          | 52                            | 68    | 72    | —     |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 255                           | 201   | 183   | 113   |               |                   |                |            |               |              |               |              |               | —                                    | —                                  | —                                |  |
| Target Date                              |        |                          |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| Vanguard Target Retirement 2020 Fund     | VTWNX  | Target Date              | 5.97                          | 3.50  | 7.40  | 5.47  | 🟢             | 10.09             | 0.86           | 12.11      | 🟢             | —            | 🟢             | 0.08         | 🟢             | 4                                    | 1-Low                              | —                                |  |
| percentile rank                          |        |                          | 20                            | 42    | 59    | 37    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 151                           | 135   | 119   | 70    |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | —                                |  |
| Vanguard Target Retirement 2025 Fund     | VTTVX  | Target Date              | 6.10                          | 4.08  | 8.77  | 6.16  | 🟢             | 11.63             | 0.92           | 12.11      | 🟢             | —            | 🟢             | 0.08         | 🟢             | 3                                    | 1-Low                              | Low Risk                         |  |
| percentile rank                          |        |                          | 20                            | 18    | 36    | 19    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 202                           | 185   | 158   | 102   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | 12-31-2022                       |  |
| Vanguard Target Retirement 2030 Fund     | VTHRX  | Target Date              | 6.03                          | 4.51  | 9.94  | 6.70  | 🟢             | 12.69             | 0.94           | 12.11      | 🟢             | —            | 🟢             | 0.08         | 🟢             | 3                                    | 1-Low                              | Low Risk                         |  |
| percentile rank                          |        |                          | 22                            | 26    | 40    | 32    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                          | 237                           | 220   | 187   | 124   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | 12-31-2022                       |  |

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| Name                                   | Ticker | Asset Class | Trailing Performance and Risk |      |       |       |               |                   |                | Management |               | Style        |               | Expense      |               | ESG Metrics        |                  |                |
|----------------------------------------|--------|-------------|-------------------------------|------|-------|-------|---------------|-------------------|----------------|------------|---------------|--------------|---------------|--------------|---------------|--------------------|------------------|----------------|
|                                        |        |             | 1 Yr                          | 3 Yr | 5 Yr  | 10 Yr | Pass/<br>Fail | Std Dev<br>3 Yr % | Beta 3<br>Yr % | Tenure     | Pass/<br>Fail | Style<br>Box | Pass/<br>Fail | Exp<br>Ratio | Pass/<br>Fail | Sustain.<br>Rating | Commit.<br>Level | Carbon<br>Risk |
|                                        |        |             |                               |      |       |       |               |                   |                |            |               |              |               |              |               | <i>Updated</i>     | <i>Updated</i>   | <i>Updated</i> |
| Vanguard Target Retirement 2035 Fund   | VTHX   | Target Date | 6.26                          | 5.01 | 11.15 | 7.26  | ✓             | 13.46             | 0.93           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 18                            | 29   | 56    | 34    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 234                           | 211  | 180   | 123   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2040 Fund   | VFORX  | Target Date | 6.42                          | 5.47 | 12.36 | 7.80  | ✓             | 14.23             | 0.94           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 19                            | 40   | 59    | 37    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 233                           | 215  | 182   | 124   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2045 Fund   | VTIVX  | Target Date | 6.57                          | 5.90 | 13.56 | 8.27  | ✓             | 15.03             | 0.95           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 19                            | 35   | 44    | 27    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 228                           | 211  | 180   | 123   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2050 Fund   | VFIFX  | Target Date | 6.65                          | 6.22 | 13.84 | 8.40  | ✓             | 15.46             | 0.96           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 15                            | 28   | 40    | 24    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 231                           | 213  | 182   | 124   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2055 Fund   | VFFVX  | Target Date | 6.67                          | 6.23 | 13.84 | 8.38  | ✓             | 15.47             | 0.96           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 18                            | 30   | 51    | 32    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 228                           | 211  | 180   | 118   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2060 Fund   | VTSX   | Target Date | 6.65                          | 6.23 | 13.83 | 8.38  | ✓             | 15.46             | 1.21           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 17                            | 31   | 59    | 48    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 224                           | 207  | 171   | 63    |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2065 Fund   | VLXVX  | Target Date | 6.67                          | 6.24 | 13.84 | —     | ✓             | 15.44             | 1.21           | 7.72       | ✓             | —            | ✓             | 0.08         | ✓             | 3                  | 1-Low            | Low Risk       |
| <i>percentile rank</i>                 |        |             | 15                            | 37   | 64    | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 234                           | 176  | 82    | —     |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |
| Vanguard Target Retirement 2070 Fund   | VSVNX  | Target Date | 6.61                          | —    | —     | —     | —             | —                 | —              | 2.76       | ✖             | —            | ✓             | 0.53         | ✓             | 3                  | —                | Low Risk       |
| <i>percentile rank</i>                 |        |             | 19                            | —    | —     | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 234                           | 176  | 82    | —     |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |
| Vanguard Target Retirement Income Fund | VTINX  | Target Date | 5.82                          | 3.11 | 5.14  | 4.15  | ✓             | 8.69              | 0.94           | 12.11      | ✓             | —            | ✓             | 0.08         | ✓             | 4                  | 1-Low            | —              |
| <i>percentile rank</i>                 |        |             | 27                            | 32   | 61    | 38    |               |                   |                |            |               |              |               |              |               |                    |                  |                |
| <i># of funds in category</i>          |        |             | 172                           | 157  | 134   | 93    |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | —              |

### Balanced

|                                       |       |             |      |      |       |      |   |       |      |      |   |   |   |      |   |            |            |            |
|---------------------------------------|-------|-------------|------|------|-------|------|---|-------|------|------|---|---|---|------|---|------------|------------|------------|
| Vanguard LifeStrategy Cnsv Gr Inv     | VSCGX | Target Risk | 5.53 | 3.19 | 5.90  | 4.69 | ✓ | 10.32 | 1.03 | 3.10 | ✓ | — | ✓ | 0.12 | ✓ | 3          | 1-Low      | —          |
| <i>percentile rank</i>                |       |             | 41   | 40   | 72    | 30   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>         |       |             | 447  | 435  | 399   | 293  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 07-19-2023 | —          |
| Vanguard LifeStrategy Growth Inv      | VASGX | Target Risk | 6.37 | 5.55 | 12.18 | 7.67 | ✓ | 14.41 | 1.03 | 3.10 | ✓ | — | ✓ | 0.14 | ✓ | 3          | 1-Low      | Low Risk   |
| <i>percentile rank</i>                |       |             | 20   | 28   | 41    | 29   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>         |       |             | 306  | 297  | 267   | 220  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 07-19-2023 | 12-31-2022 |
| Vanguard LifeStrategy Income Inv      | VASIX | Target Risk | 5.11 | 1.95 | 2.78  | 3.10 | ✓ | 8.45  | 1.03 | 3.10 | ✓ | — | ✓ | 0.11 | ✓ | 4          | 1-Low      | —          |
| <i>percentile rank</i>                |       |             | 55   | 68   | 90    | 62   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>         |       |             | 158  | 148  | 142   | 111  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 07-19-2023 | —          |
| Vanguard LifeStrategy Mod Gr Inv Shrs | VSMGX | Target Risk | 5.93 | 4.37 | 9.01  | 6.20 | ✓ | 12.34 | 1.01 | 3.10 | ✓ | — | ✓ | 0.13 | ✓ | 3          | 1-Low      | Low Risk   |
| <i>percentile rank</i>                |       |             | 33   | 45   | 74    | 52   |   |       |      |      |   |   |   |      |   |            |            |            |
| <i># of funds in category</i>         |       |             | 715  | 690  | 638   | 496  |   |       |      |      |   |   |   |      |   | 02-28-2025 | 07-19-2023 | 12-31-2022 |