

# PIONEER SPINE AND SPORTS PHYSICIANS

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

🚫 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 | Commit.<br>Level | Carbon<br>Risk |  |
|                                         |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| US Stock                                |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| T. Rowe Price Dividend Growth           | PRDGX  | Large Blend               | 7.38                          | 7.58  | 15.89 | 11.44 | 🟢             | 14.88             | 0.81           | 25.02      | 🟢             | 🇺🇸           | 🟢             | 0.64         | 🟢             | 3                  | —                | Low Risk       |  |
| percentile rank                         |        |                           | 35                            | 62    | 78    | 45    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # 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     |  |
| American Funds Growth Fund of Amer R6   | RGAGX  | Large Growth              | 7.12                          | 8.90  | 17.59 | 12.90 | 🟢             | 19.80             | 0.94           | 23.43      | 🟢             | 🇺🇸           | 🟢             | 0.30         | 🟢             | 1                  | 1-Low            | Low Risk       |  |
| percentile rank                         |        |                           | 28                            | 39    | 42    | 45    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 1,103                         | 1,052 | 972   | 759   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 04-07-2022       | 12-31-2022     |  |
| Invesco Growth and Income Y             | ACGMX  | Large Value               | 4.98                          | 6.85  | 18.93 | 9.10  | 🟢             | 18.01             | 1.04           | 22.10      | 🟢             | 🇺🇸           | 🟢             | 0.53         | 🟢             | 2                  | —                | Medium Risk    |  |
| percentile rank                         |        |                           | 70                            | 53    | 16    | 46    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 1,175                         | 1,109 | 1,049 | 824   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| MFS Mid Cap Growth R6                   | OTCKX  | Mid-Cap Growth            | -2.61                         | 3.64  | 11.66 | 10.29 | 🟢             | 19.77             | 0.87           | 16.37      | 🟢             | 🇺🇸           | 🟢             | 0.66         | 🟢             | 4                  | 2-Basic          | Low Risk       |  |
| percentile rank                         |        |                           | 45                            | 26    | 59    | 13    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # 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     |  |
| Vanguard Small Cap Growth Index Admiral | VSGAX  | Small Growth              | -2.83                         | 1.18  | 11.47 | 7.30  | 🟢             | 23.14             | 0.95           | 20.26      | 🟢             | 🇺🇸           | 🟢             | 0.07         | 🟢             | 4                  | 1-Low            | Medium Risk    |  |
| percentile rank                         |        |                           | 32                            | 37    | 58    | 50    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 559                           | 543   | 528   | 398   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Victory Sycamore Small Company Opp I    | VSOIX  | Small Value               | -5.99                         | 2.22  | 13.65 | 8.21  | 🟢             | 20.86             | 0.86           | 26.85      | 🟢             | 🇺🇸           | 🔴             | 0.89         | 🟢             | 3                  | —                | Medium Risk    |  |
| percentile rank                         |        |                           | 73                            | 53    | 91    | 12    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 503                           | 482   | 456   | 365   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Non-US Stock                            |        |                           |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| American Funds New World R6             | RNWGX  | Diversified Emerging Mkts | 3.31                          | 3.31  | 10.83 | 6.44  | 🟢             | 15.36             | 0.78           | 25.81      | 🟢             | 🇺🇸           | 🟢             | 0.57         | 🟢             | 3                  | 1-Low            | Medium Risk    |  |
| percentile rank                         |        |                           | 68                            | 25    | 24    | 3     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 787                           | 724   | 646   | 439   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| American Funds Intl Gr and Inc R6       | RIGGX  | Foreign Large Blend       | 5.25                          | 6.28  | 11.90 | 5.30  | 🟢             | 16.15             | 0.97           | 16.51      | 🟢             | 🇺🇸           | 🟢             | 0.54         | 🟢             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                         |        |                           | 66                            | 34    | 44    | 50    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 761                           | 706   | 662   | 445   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Invesco Oppenheimer International Gr Y  | OIGYX  | Foreign Large Growth      | -5.17                         | 1.79  | 8.16  | 4.29  | 🟢             | 20.54             | 1.17           | 13.01      | 🟢             | 🇺🇸           | 🟢             | 0.86         | 🟢             | 4                  | —                | Low Risk       |  |
| percentile rank                         |        |                           | 87                            | 61    | 69    | 80    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 392                           | 372   | 338   | 218   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| Vanguard International Value Inv        | VTRIX  | Foreign Large Value       | 1.59                          | 4.54  | 11.60 | 4.65  | 🟢             | 17.13             | 0.99           | 14.85      | 🟢             | 🇺🇸           | 🔴             | 0.36         | 🟢             | 3                  | —                | Medium Risk    |  |
| percentile rank                         |        |                           | 97                            | 89    | 81    | 67    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 369                           | 347   | 323   | 230   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | —                | 12-31-2022     |  |
| American Funds New Perspective R6       | RNPGX  | Global Stock              | 5.96                          | 5.89  | 15.61 | 10.74 | 🟢             | 17.66             | 1.07           | 24.35      | 🟢             | —            | 🟢             | 0.41         | 🟢             | 3                  | 2-Basic          | Low Risk       |  |
| percentile rank                         |        |                           | 22                            | 36    | 16    | 14    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                  |        |                           | 342                           | 328   | 280   | 196   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |

PIONEER SPINE AND SPORTS PHYSICIANS

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

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                              |        |                              |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| PIMCO Commodity Real Return Strat I2     | PCRPX  | Commodities<br>Broad Basket  | 13.15                         | -2.16 | 16.88 | 3.34  | ✔             | 14.90             | 1.15           | 6.42       | ✔             | —            | —             | 1.10         | ✔             | 2                                    | —                                  | —                                |  |
| percentile rank                          |        |                              | 9                             | 87    | 39    | 54    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 110                           | 101   | 95    | 67    |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| American Century Real Estate I           | REAIX  | Real Estate                  | 11.18                         | -1.02 | 9.43  | 4.99  | ✔             | 19.37             | 0.93           | 16.38      | ✔             | —            | ✔             | 0.95         | ✔             | 3                                    | —                                  | Low Risk                         |  |
| percentile rank                          |        |                              | 16                            | 26    | 58    | 43    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 229                           | 221   | 204   | 152   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | 12-31-2022                       |  |
| Fixed Income                             |        |                              |                               |       |       |       |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| PIMCO International Bond (USD-Hdg) I-2   | PFBPX  | Global Bond                  | 4.59                          | 2.70  | 2.07  | 2.59  | ✔             | 4.95              | 0.54           | 10.52      | ✔             | —            | —             | 0.85         | ✔             | 3                                    | —                                  | —                                |  |
| percentile rank                          |        |                              | 43                            | 12    | 14    | 10    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 109                           | 104   | 99    | 60    |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| BlackRock High Yield Instl               | BHYIX  | High Yield Bond              | 7.34                          | 5.08  | 7.60  | 4.95  | ✔             | 8.34              | 0.99           | 15.26      | ✔             | —            | —             | 0.58         | ✔             | —                                    | 2-Basic                            | —                                |  |
| percentile rank                          |        |                              | 27                            | 22    | 24    | 13    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 632                           | 600   | 551   | 434   |               |                   |                |            |               |              |               |              |               | —                                    | 02-15-2022                         | —                                |  |
| American Century Inflation Adj's Bond R5 | AIANX  | Inflation-<br>Protected Bond | 6.23                          | -0.36 | 2.52  | 2.31  | ✔             | 7.43              | 1.03           | 23.35      | ✔             | —            | —             | 0.34         | ✔             | 3                                    | —                                  | —                                |  |
| percentile rank                          |        |                              | 39                            | 70    | 33    | 47    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 158                           | 150   | 141   | 117   |               |                   |                |            |               |              |               |              |               | 05-31-2024                           | —                                  | —                                |  |
| Baird Aggregate Bond Inst                | BAGIX  | Intermediate-<br>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                         | —                                |  |
| PIMCO Income I2                          | PONPX  | Multisector<br>Bond          | 7.30                          | 4.53  | 5.12  | 4.30  | ✔             | 6.54              | 0.83           | 18.02      | ✔             | —            | —             | 0.93         | ✔             | 4                                    | —                                  | —                                |  |
| percentile rank                          |        |                              | 31                            | 18    | 42    | 6     |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 375                           | 346   | 295   | 204   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| PIMCO Short-Term I2                      | PTSPX  | Ultrashort Bond              | 5.55                          | 4.73  | 3.55  | 2.50  | ✔             | 0.99              | -0.02          | 14.25      | ✔             | —            | —             | 0.58         | ✖             | 3                                    | —                                  | —                                |  |
| percentile rank                          |        |                              | 43                            | 26    | 25    | 22    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 255                           | 201   | 183   | 113   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | —                                  | —                                |  |
| 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                       |  |
| Vanguard Target Retirement 2035 Fund     | VTTTHX | Target Date                  | 6.26                          | 5.01  | 11.15 | 7.26  | ✔             | 13.46             | 0.93           | 12.11      | ✔             | —            | ✔             | 0.08         | ✔             | 3                                    | 1-Low                              | Low Risk                         |  |
| percentile rank                          |        |                              | 18                            | 29    | 56    | 34    |               |                   |                |            |               |              |               |              |               |                                      |                                    |                                  |  |
| # of funds in category                   |        |                              | 234                           | 211   | 180   | 123   |               |                   |                |            |               |              |               |              |               | 02-28-2025                           | 02-15-2022                         | 12-31-2022                       |  |

PIONEER SPINE AND SPORTS PHYSICIANS

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        |  |
| 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       |  |
| percentile rank                        |        |             | 19                            | 40   | 59    | 37    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 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       |  |
| percentile rank                        |        |             | 19                            | 35   | 44    | 27    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 228                           | 211  | 180   | 123   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Vanguard Target Retirement 2050 Fund   | VFIX   | Target Date | 6.65                          | 6.22 | 13.84 | 8.40  | ✔             | 15.46             | 0.96           | 12.11      | ✔             | —            | ✔             | 0.08         | ✔             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                        |        |             | 15                            | 28   | 40    | 24    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 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       |  |
| percentile rank                        |        |             | 18                            | 30   | 51    | 32    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 228                           | 211  | 180   | 118   |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | 12-31-2022     |  |
| Vanguard Target Retirement 2060 Fund   | VITSX  | Target Date | 6.65                          | 6.23 | 13.83 | 8.38  | ✔             | 15.46             | 1.21           | 12.11      | ✔             | —            | ✔             | 0.08         | ✔             | 3                  | 1-Low            | Low Risk       |  |
| percentile rank                        |        |             | 17                            | 31   | 59    | 48    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 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       |  |
| percentile rank                        |        |             | 15                            | 37   | 64    | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 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       |  |
| percentile rank                        |        |             | 19                            | —    | —     | —     |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 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            | —              |  |
| percentile rank                        |        |             | 27                            | 32   | 61    | 38    |               |                   |                |            |               |              |               |              |               |                    |                  |                |  |
| # of funds in category                 |        |             | 172                           | 157  | 134   | 93    |               |                   |                |            |               |              |               |              |               | 02-28-2025         | 02-15-2022       | —              |  |

Balanced

|                                       |       |             |      |      |       |      |  |       |      |      |  |   |  |      |  |            |            |            |
|---------------------------------------|-------|-------------|------|------|-------|------|--|-------|------|------|--|---|--|------|--|------------|------------|------------|
| Vanguard LifeStrategy Cnsvr Gr Inv    | VSCGX | Target Risk | 5.53 | 3.19 | 5.90  | 4.69 |  | 10.32 | 1.03 | 3.10 |  | — |  | 0.12 |  | 3          | 1-Low      | —          |
| percentile rank                       |       |             | 41   | 40   | 72    | 30   |  |       |      |      |  |   |  |      |  |            |            |            |
| # of funds in category                |       |             | 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   |
| percentile rank                       |       |             | 20   | 28   | 41    | 29   |  |       |      |      |  |   |  |      |  |            |            |            |
| # of funds in category                |       |             | 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      | —          |
| percentile rank                       |       |             | 55   | 68   | 90    | 62   |  |       |      |      |  |   |  |      |  |            |            |            |
| # of funds in category                |       |             | 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   |
| percentile rank                       |       |             | 33   | 45   | 74    | 52   |  |       |      |      |  |   |  |      |  |            |            |            |
| # of funds in category                |       |             | 715  | 690  | 638   | 496  |  |       |      |      |  |   |  |      |  | 02-28-2025 | 07-19-2023 | 12-31-2022 |