Best/ Worst Return

Monthly: 01/1926 - 03/2009; Default Currency: USD

| Annualized Average Rolling Return | 1 Year | 3 Years | 5 Years | 10 Years | 15 Years | 20 Years |
|-----------------------------------|-------------------------|------------------------|------------------------|------------------|-----------------|---------------------------|
| S&P 500 Index | 12.15% | 10.73% | 10.30% | 10.95% | 11.21% | 11.41% |
| Best Return (%) | 162.88% (7/1932) | 43.35% (3/1933) | 36.12% (6/1932) | 21.43% (6/1949) | 19.69% (8/1982) | 18.26% (4/1980) |
| Worst Return (%) | -67.57% (7/1931) | -42.35% (7/1929) | -17.36% (9/1929) | -4.95% (9/1929) | -0.41% (9/1929) | 1.89% ^(9/1929) |
| Five-Year US Treasury Notes | 5.50% | 5.40% | 5.41% | 5.44% | 5.43% | 5.44% |
| Best Return (%) | 32.70% (10/1981) | 18.41% (7/1982) | 19.46% (9/1981) | 13.72% (10/1981) | 11.31% (9/1981) | 10.47% (10/1981) |
| Worst Return (%) | -5.55% (11/1993) | -0.41% (8/1954) | 0.66% (6/1948) | 1.17% (6/1943) | 1.38% (8/1942) | 1.58% (1/1940) |
| CRSP Deciles 9-10 Index | 18.68% | 14.25% | 13.71% | 13.90% | 13.97% | 13.99% |
| Best Return (%) | 567.63% (7/1932) | 108.05% (3/1933) | 76.75% (6/1932) | 30.08% (4/1933) | 30.83% (7/1932) | 26.69% (7/1932) |
| Worst Return (%) | -72.06% (4/1937) | -53.24% (7/1929) | -31.59% (7/1927) | -3.70% (6/1928) | 1.85% (6/1927) | 6.11% (1/1955) |
| 60/40 Mix | 10.05% | 9.43% | 9.30% | 9.69% | 9.77% | 9.84% |
| Best Return (%) | 125.41% (7/1932) | 36.59% (3/1933) | 30.14% (6/1932) | 15.99% (8/1982) | 15.56% (8/1982) | 14.91% (4/1980) |
| Worst Return (%) | -47.35% (7/1931) | -26.71% (7/1929) | -9.90% (6/1927) | 1.76% (3/1999) | 4.38% (12/1928) | 5.11% (9/1929) |



See Standardized Performance Data & Disclosures.

Selection of funds, indices and time periods presented chosen by client's advisor. Indices are not available for direct investment and performance does not reflect expenses of an actual portfolio. Past performance is not a guarantee of future results.

CRSP data provided by the Center for Research in Security Prices, University of Chicago. US long-term bonds, bills, inflation, and fixed income factor data © Stocks, Bonds, Bills, and Inflation Yearbook", Ibbotson Associates, Chicago (annually updated work by Roger G. Ibbotson and Rex A. Sinquefield). The S&P data are provided by Standard & Poor's Index Services Group.