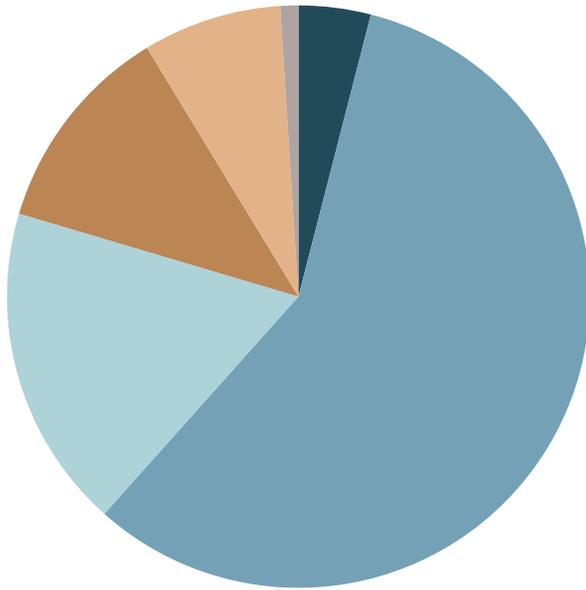


CORE GROWTH



- Bonds: 4%
- Large Cap Stocks: 57.6%
- Foreign Stocks: 18%
- Mid/Small Cap Stocks: 11.7%
- Alternatives/Other: 7.7%
- Cash: 1%

Learn more about the **CALIBER WEALTH** investment process.



Account Type:	Discretionary Managed
Objective:	Aggressive Growth and Income
Risk Level:	Growth
Description:	Diversified Portfolio consisting primarily of Exchanged Traded Funds (ETFs) and Mutual Funds. Seeks long-term appreciation.
Managers:	Caliber Investment Committee
Expense Ratio:	0.26%
Standard Deviation:	17.17%
Inv. Minimum:	\$25,000
Projected Yield:	1.65%

TOP 5 HOLDINGS

as of February 2025

IShares Core S&P 500 ETF (IVV)	39.6%
Avantis US Equity ETF (AVUS)	18%
IShares Core S&P Mid-Cap ETF (IJH)	7.2%
Avantis Emerging Markets Equity ETF	4.5%
Avantis International Equity ETF	4.5%

All data collected as of January 2026.
Tax sensitive version available.

COMPLEX MADE SIMPLE

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