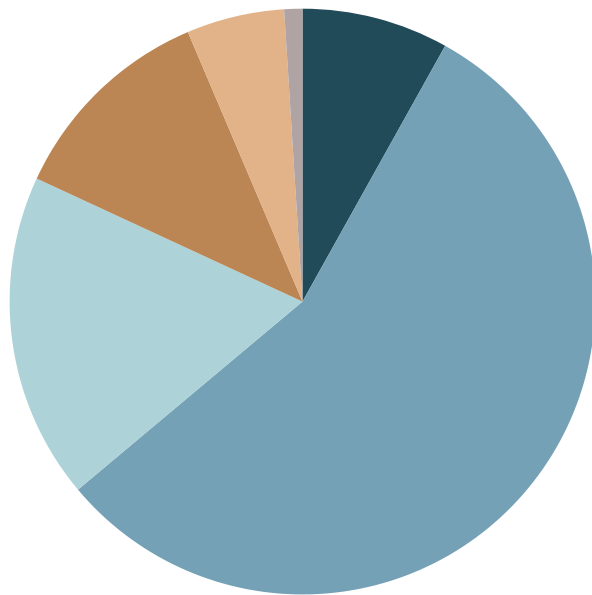


CORE GROWTH



- Bonds: 8.1%
- Large Cap Stocks: 55.8%
- Foreign Stocks: 18%
- Mid/Small Cap Stocks: 11.7%
- Alternatives/Other: 5.4%
- Cash: 1%

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:	0.29%
Standard Deviation:	16.5%
Inv. Minimum:	\$25,000
Projected Yield:	1.9%

TOP 5 HOLDINGS

as of July 2026

IShares Core S&P 500 ETF (IVV)	37.8%
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 July 2026.
Tax sensitive version available.

LEARN MORE ABOUT
OUR **INVESTMENT**
PROCESS HERE.



COMPLEX MADE SIMPLE

Investment advisory services provided by Caliber Wealth Management, LLC, an SEC registered investment adviser. Portfolio metrics noted are estimates derived from model portfolio data and do not represent actual account composites, so investors should note that actual results may differ. Data provided is for informational purposes only and should not be considered investment advice. Some of the data provided has been obtained from publicly available sources, but no representation or warranty is made as to accuracy and completeness. Investments involve risk and the possibility of loss and no guarantees are made about future results. Always consult with your financial adviser regarding your specific circumstances.