



# FRAMEWORK PORTFOLIOS AT-A-GLANCE

## Strategy 1



Equity 80–100%  
Fixed Income 0–15%  
Cash 0–20%

### Growth Portfolio

CHARACTERISTICS:

Little to no consideration of current income

Willing to accept high volatility in exchange for high potential capital appreciation

Inflation protection is a major concern

Generally a long-term time horizon

## Strategy 2



Equity 60–90%  
Fixed Income 5–35%  
Cash 0–20%

### Growth-with-Income Portfolio

CHARACTERISTICS:

Emphasis on growth investments with a minor emphasis on income generation

Willing to accept significant volatility in exchange for potential capital appreciation

Inflation protection is a moderate-to-high concern

Generally a long-term time horizon

## Strategy 3



Equity 45–75%  
Fixed Income 20–50%  
Cash 0–20%

### Balanced Portfolio

CHARACTERISTICS:

Emphasis on growth investments with a modest amount of income generation

Willing to accept moderate volatility in exchange for potential capital appreciation

Inflation protection is a moderate concern

Generally an intermediate-to-long-term time horizon

## Strategy 4



Equity 30–60%  
Fixed Income 35–65%  
Cash 0–20%

### Income-with-Growth Portfolio

CHARACTERISTICS:

Emphasis on current income and near-term total return

Willing to accept some volatility in exchange for potential capital appreciation

Inflation protection is a low-to-moderate concern

Generally a short-to-intermediate time horizon

## Strategy 5



Equity 10–40%  
Fixed Income 55–85%  
Cash 0–20%

### Income Portfolio

CHARACTERISTICS:

Strong emphasis on current income

Expectation of some capital appreciation

Inflation protection is a minor concern

Generally a short to intermediate time horizon

## Strategy 6



Equity 0–15%  
Fixed Income 0–100%  
Cash 0–100%

### Stability Portfolio

CHARACTERISTICS:

Current income only

Limited exposure to the equity markets

Inflation protection is not a concern

Generally a short time horizon

Historical return ranges from 12/1991 to 12/2016, based on rolling 12-month returns.