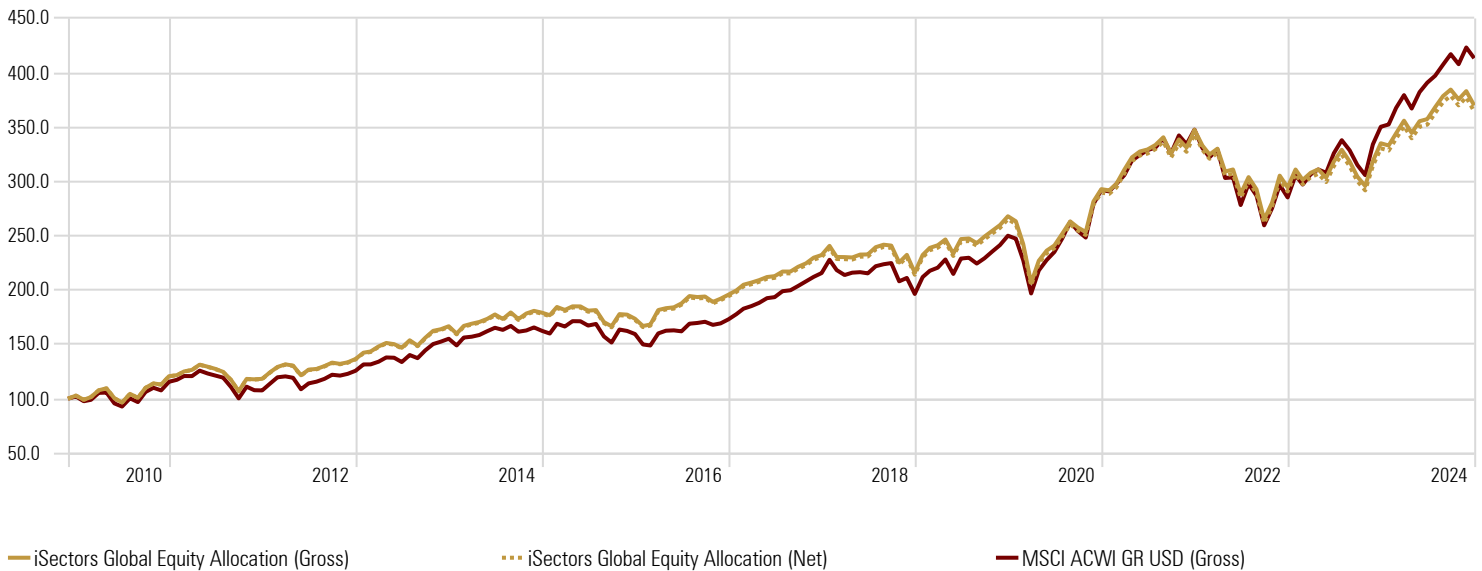


## Investment Growth



Investment Type	Separate Account	Inception Date	12/1/2009
Primary Prospectus Benchmark	MSCI ACWI Index	Max Strategist Fee	0.10
Morningstar Category	US SA Global Large-Stock Blend	Morningstar Secl	F00000GWND

## Investment Strategy

The objective of the iSectors® Global Equity Allocation model is to provide long-term growth of capital. This equity-only portfolio is allocated among a diversified selection of domestic and international low-cost equity index-based exchange-traded funds (ETFs). In addition, fundamentally-weighted, dividend-focused index ETFs are used in an effort to enhance return and reduce volatility. Two percent of the portfolio is allocated to cash and/or money market securities to provide liquidity and facilitate transactions.

## Trailing Returns

Calculation Benchmark: MSCI ACWI GR USD

	YTD	1 Year	3 Years	5 Years	10 Years	15 Years	Since Incept.
iSectors Global Equity Allocation (Gross)	10.37	10.37	2.10	6.66	7.52	8.90	9.06
iSectors Global Equity Allocation (Net)	10.26	10.26	2.00	6.55	7.41	8.80	8.95
MSCI ACWI GR USD	18.02	18.02	5.94	10.58	9.79	9.77	9.87

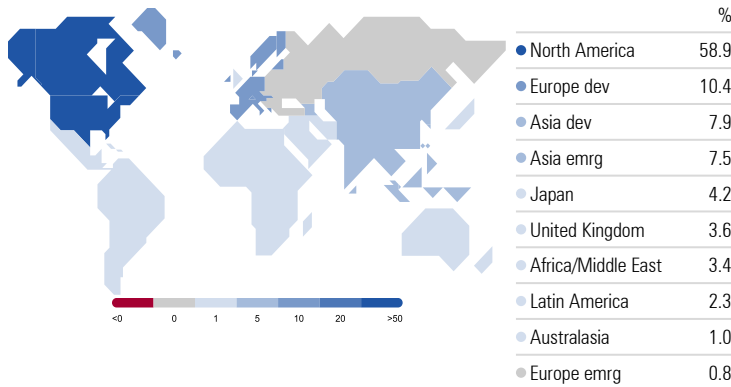
## Risk Statistics

Time Period: 12/1/2009 to 12/31/2024

	Inv		Bmk1
	Gross	Net	
Std Dev	13.65	13.65	14.67
Correlation	0.98	0.98	1.00
Alpha	-0.07	-0.17	0.00
Sharpe Ratio	0.61	0.61	0.63
Max Drawdown	-23.77	-23.83	-25.34
Max Drawdown Peak Date	1/1/2022	1/1/2022	1/1/2022
Max Drawdown Valley Date	9/30/2022	9/30/2022	9/30/2022
Max Drawdown # of Periods	9.00	9.00	9.00
Calmar Ratio	0.38	0.38	0.39

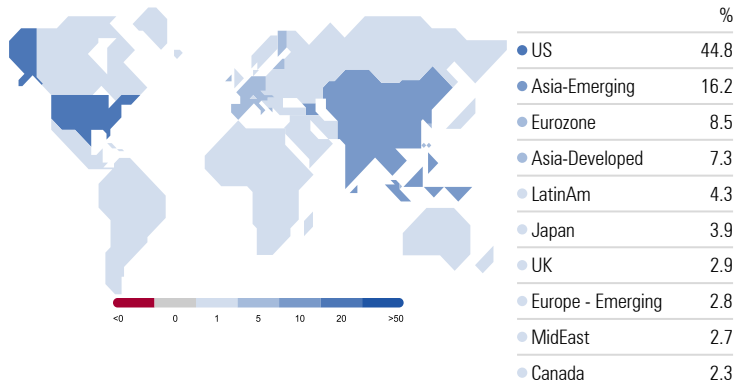
## Equity Regional Exposure - iSectors Global Equity Allocation

Portfolio Date: 12/31/2024



## Revenue Exposure by Region - iSectors Global Equity Allocation

Portfolio Date: 12/31/2024

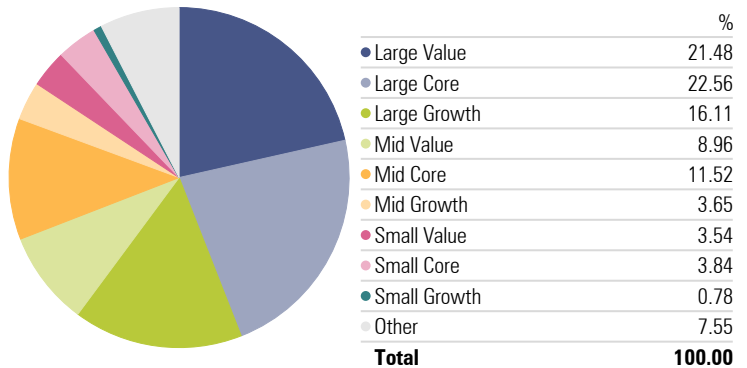


## Snapshot - iSectors Global Equity Allocation

Leveraged Fund	No
Domicile	United States
# of Holdings	13
Aggregated 12 Month Yield	2.34
Turnover Ratio %	0.00

## Equity Style - iSectors Global Equity Allocation

Portfolio Date: 12/31/2024



## Operations - iSectors Global Equity Allocation

Manager Name	John Koch, CFA
Firm Phone	8004732867
Firm Web Address	www.isectors.com
Firm Street Address	5485 W. Grande Market Drive, Suite D,
Firm City	Appleton
Firm State or Province	WI

iSectors® is a suite of proprietary asset allocation models and services. iSectors®, LLC is an affiliate of Sumnicht & Associates, LLC (Sumnicht) and, as such, iSectors® and Sumnicht share certain employee services. iSectors® became registered as an investment advisor in August 2008. iSectors® is a registered trademark of Sumnicht Holdings, LLC. The contents of this presentation are for informational purposes only. Content should not be construed as financial or investment advice on any subject matter. This is neither an offer nor a solicitation to buy and/or sell securities. Information pertaining to iSectors® operations, services, and fees is set forth in its current disclosure statement (Form ADV, Part 2 Brochure), a copy of which is available upon request. iSectors® asset allocation models are not guaranteed and involve risk of loss. At any given point in time, the value of iSectors® asset allocation model portfolios may be worth more or less than the amount invested. Different types of investments and/or investment strategies involve varying levels of risk, and there can be no assurance that any specific investment or investment strategy (including the investments and/or investment strategies devised or undertaken by iSectors®) will be either suitable or profitable. Financial professionals are responsible for evaluating investments risks independently and for exercising independent judgement in determining whether investments are appropriate for their clients. Past performance may not be indicative of future results. Therefore, no current or prospective investor should assume that future performance will be profitable, or equal either the performance results reflected or any corresponding historical index. Asset allocation and diversification concepts do not ensure a profit nor protect against loss in a declining market. The historical benchmark index performance results are provided exclusively for comparison purposes to assist an advisor in determining whether the performance of a specific investment meets their respective client's investment objective(s). It should not be assumed that any account holdings will correspond directly to any comparative index. Index performance results do not reflect the impact of taxes. Indexes are not available for direct investment. Index performance results are compiled directly by each respective index and obtained by iSectors® from reliable sources. Index performance has not been independently verified by iSectors®. iSectors® models are based primarily on index ETFs that can neither outperform nor underperform their benchmark index. We provide benchmark indexes that are well known for comparison purposes only. Net Performance results reflect the deduction of the iSectors® Strategist Fee. Actual client results will be lower based on fees for platform, advisory, transaction, and custodial services that are not set at (and may not be known at) the iSectors® level. Additionally, if your account (through your adviser or otherwise) does not fully follow a specific iSectors® model, performance would also, of course, further differ. Please consult your financial adviser for fees applicable to your account. ERISA (group retirement) accounts are subject to additional recordkeeping and/or administrative fees. Sumnicht & Associates / iSectors® (the "Firm") claims compliance with the Global Investment Performance Standards (GIPS®). GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant accuracy or quality of the content contained herein. To obtain a GIPS® composite report and/or the Firm's list of composite descriptions contact John Koch, Chief Investment Officer, at (920) 257-5170. You should not assume that any discussion or information contained in this presentation serves as the receipt of, or as a substitute for, personalized investment advice from an investment professional. This presentation has not been reviewed, submitted for review before, or otherwise approved by FINRA, the SEC or any state or provincial securities regulators.