

This “Quick Guide” applies to Index Portfolios and Socially Responsible Index Portfolios

This guide will help you select an age-appropriate portfolio. Simply determine if the Risk Profile for your age group accurately describes your capacity for risk. You can select another portfolio if you are confident that the description for that portfolio better describes your ability to handle risk. You may choose to implement your portfolio in an SRI (Catholic Values) Portfolio or a Traditional Index Portfolio. More information about each of these portfolios can be found in the handout included with your enrollment package.

Quick Guide to Index Portfolio Selection

Age Profile	Risk Profile	Index Portfolio
Only High Risk Investors	Aggressive	90 OR SRI 90
Age 20 to 30	Moderately Aggressive	80 OR SRI 80
Age 30 to 40	Moderately Aggressive	70 OR SRI 70
Age 40 to 50	Moderate	60 OR SRI 60
Age 50 to 60	Moderate	50 OR SRI 50
Age 60 to 70	Moderately Conservative	40 OR SRI 40
Age 70 +	Moderately Conservative	30 OR SRI 30
Only Low Risk Investors	Conservative	20 OR SRI 20
Only Low Risk Investors	Highly Conservative	10 OR SRI 10