

Morningstar® Lifetime Allocation Indexes

Aggressive Summary Allocations

Data as of June 2021.

Target Retirement Year:	2065	2060	2055	2050	2045	2040	2035	2030	2025	2020	2015	2010	2005	2000
Stocks %	97.00	97.00	97.00	96.93	96.54	94.25	88.43	79.43	69.74	61.50	55.25	50.42	47.20	47.20
U.S. %	55.03	56.18	57.34	58.47	59.39	59.15	56.62	51.91	46.52	41.85	38.32	35.62	33.82	33.82
Non-U.S. %	41.97	40.82	39.66	38.47	37.15	35.10	31.80	27.52	23.22	19.65	16.93	14.80	13.38	13.38
Morningstar Large Value	10.81	11.24	11.67	12.11	12.51	12.65	12.27	11.38	10.30	9.35	8.65	8.14	7.80	7.80
Morningstar Large Core	9.15	9.51	9.88	10.25	10.59	10.71	10.39	9.63	8.71	7.91	7.32	6.88	6.60	6.60
Morningstar Large Growth	7.76	8.07	8.38	8.69	8.98	9.08	8.81	8.17	7.39	6.71	6.21	5.84	5.60	5.60
Morningstar Mid Value	4.63	4.82	5.00	5.19	5.36	5.42	5.26	4.88	4.41	4.01	3.71	3.49	3.34	3.34
Morningstar Mid Core	3.92	4.08	4.23	4.39	4.54	4.59	4.45	4.13	3.73	3.39	3.14	2.95	2.83	2.83
Morningstar Mid Growth	3.33	3.46	3.59	3.73	3.85	3.89	3.78	3.50	3.17	2.88	2.66	2.50	2.40	2.40
Morningstar Small Value	4.54	4.43	4.31	4.18	4.03	3.78	3.40	2.90	2.41	1.99	1.67	1.41	1.23	1.23
Morningstar Small Core	3.94	3.85	3.75	3.63	3.50	3.28	2.95	2.52	2.09	1.73	1.45	1.23	1.07	1.07
Morningstar Small Growth	3.47	3.38	3.29	3.19	3.07	2.89	2.59	2.21	1.84	1.52	1.27	1.08	0.94	0.94
Morningstar US REIT	3.48	3.35	3.23	3.10	2.98	2.85	2.73	2.60	2.48	2.35	2.23	2.10	2.00	2.00
Morningstar Dev Mkts ex-US	29.05	28.65	28.24	27.77	27.19	26.05	23.92	20.97	17.93	15.37	13.41	11.87	10.84	10.84
Morningstar Emerging Mkts	12.93	12.16	11.42	10.69	9.96	9.06	7.89	6.55	5.29	4.28	3.52	2.93	2.54	2.54
Bonds %	3.00	3.00	3.00	3.04	3.27	5.16	9.84	16.48	22.73	26.96	29.02	29.53	29.18	29.18
U.S. %	2.38	2.40	2.43	2.48	2.67	4.21	8.03	13.45	18.54	21.96	23.60	23.96	23.61	23.61
Non-U.S. %	0.62	0.60	0.57	0.56	0.60	0.95	1.81	3.03	4.19	5.00	5.42	5.58	5.57	5.57
Morningstar Long-Term Core	1.73	1.72	1.58	1.47	1.48	2.18	3.78	5.64	6.66	6.35	4.86	2.54	0.24	0.24
Morningstar Intermediate Core	0.49	0.52	0.64	0.77	0.90	1.54	3.22	5.92	9.00	11.83	14.19	16.23	17.71	17.71
Morningstar Short-Term Core	0.16	0.16	0.21	0.25	0.29	0.49	1.03	1.89	2.88	3.78	4.54	5.19	5.67	5.67
Morningstar Gbl Ex US Govt Bond	0.21	0.20	0.19	0.19	0.20	0.32	0.62	1.03	1.43	1.71	1.85	1.90	1.90	1.90
Morningstar EM Sovereign Bond	0.41	0.40	0.38	0.37	0.40	0.62	1.19	2.00	2.76	3.29	3.57	3.67	3.67	3.67
Inflation Hedge %	0.00	0.00	0.00	0.02	0.16	0.48	1.42	3.36	6.17	9.46	12.90	16.44	19.36	19.36
Commodities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Morningstar Long-Term TIPS	0.00	0.00	0.00	0.02	0.16	0.48	1.42	3.13	4.71	5.62	5.48	4.20	2.32	2.32
Morningstar Short-Term TIPS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	1.46	3.84	7.42	12.24	17.04	17.04
Cash %	0.00	0.00	0.00	0.01	0.03	0.11	0.31	0.74	1.36	2.08	2.83	3.61	4.25	4.25
Total %	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

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Morningstar® Lifetime Allocation Indexes

Moderate Summary Allocations

Data as of June 2021.

Target Retirement Year:	2065	2060	2055	2050	2045	2040	2035	2030	2025	2020	2015	2010	2005	2000
Stocks %	93.00	92.97	92.67	91.92	89.11	82.42	72.29	61.38	52.44	46.04	41.18	37.63	35.56	35.56
U.S. %	52.82	53.91	54.85	55.50	54.91	51.86	46.47	40.33	35.19	31.52	28.74	26.75	25.63	25.63
Non-U.S. %	40.18	39.06	37.83	36.41	34.20	30.56	25.81	21.05	17.25	14.52	12.44	10.89	9.94	9.94
Morningstar Large Value	10.35	10.76	11.14	11.46	11.52	11.01	9.96	8.71	7.65	6.91	6.36	5.98	5.79	5.79
Morningstar Large Core	8.76	9.10	9.42	9.70	9.74	9.32	8.43	7.37	6.47	5.84	5.38	5.06	4.90	4.90
Morningstar Large Growth	7.43	7.72	7.99	8.23	8.27	7.91	7.15	6.25	5.49	4.96	4.56	4.30	4.16	4.16
Morningstar Mid Value	4.44	4.61	4.77	4.91	4.94	4.72	4.27	3.73	3.28	2.96	2.72	2.56	2.48	2.48
Morningstar Mid Core	3.75	3.90	4.04	4.16	4.18	3.99	3.61	3.16	2.77	2.50	2.31	2.17	2.10	2.10
Morningstar Mid Growth	3.18	3.31	3.43	3.53	3.54	3.39	3.07	2.68	2.35	2.13	1.96	1.84	1.78	1.78
Morningstar Small Value	4.35	4.24	4.12	3.96	3.71	3.29	2.76	2.22	1.79	1.47	1.23	1.04	0.92	0.92
Morningstar Small Core	3.77	3.68	3.57	3.44	3.22	2.86	2.39	1.93	1.55	1.28	1.07	0.90	0.80	0.80
Morningstar Small Growth	3.32	3.24	3.14	3.02	2.83	2.51	2.10	1.69	1.36	1.12	0.94	0.79	0.70	0.70
Morningstar US REIT	3.48	3.35	3.23	3.10	2.98	2.85	2.73	2.60	2.48	2.35	2.23	2.10	2.00	2.00
Morningstar Dev Mkts ex-US	27.80	27.42	26.93	26.29	25.03	22.67	19.41	16.04	13.32	11.35	9.85	8.73	8.05	8.05
Morningstar Emerging Mkts	12.38	11.64	10.89	10.12	9.16	7.88	6.40	5.01	3.93	3.16	2.59	2.16	1.89	1.89
Bonds %	7.00	7.03	7.33	8.01	10.29	15.79	23.56	30.93	35.73	37.79	38.14	37.15	35.62	35.62
U.S. %	5.54	5.63	5.93	6.54	8.40	12.89	19.23	25.24	29.13	30.78	31.02	30.14	28.82	28.82
Non-U.S. %	1.46	1.40	1.40	1.47	1.89	2.90	4.32	5.69	6.59	7.01	7.13	7.01	6.80	6.80
Morningstar Long-Term Core	4.05	4.03	3.86	3.87	4.67	6.66	9.06	10.58	10.47	8.90	6.39	3.20	0.29	0.29
Morningstar Intermediate Core	1.13	1.21	1.57	2.02	2.83	4.72	7.71	11.11	14.14	16.58	18.65	20.41	21.61	21.61
Morningstar Short-Term Core	0.36	0.39	0.50	0.65	0.90	1.51	2.47	3.55	4.53	5.30	5.97	6.53	6.92	6.92
Morningstar Gbl Ex US Govt Bond	0.50	0.48	0.48	0.50	0.64	0.99	1.47	1.94	2.25	2.39	2.43	2.39	2.32	2.32
Morningstar EM Sovereign Bond	0.96	0.93	0.92	0.97	1.25	1.91	2.85	3.75	4.34	4.62	4.70	4.62	4.48	4.48
Inflation Hedge %	0.00	0.00	0.00	0.06	0.49	1.47	3.41	6.30	9.71	13.26	16.96	20.68	23.63	23.63
Commodities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Morningstar Long-Term TIPS	0.00	0.00	0.00	0.06	0.49	1.47	3.41	5.87	7.41	7.88	7.20	5.28	2.84	2.84
Morningstar Short-Term TIPS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43	2.30	5.39	9.76	15.40	20.80	20.80
Cash %	0.00	0.00	0.00	0.01	0.11	0.32	0.75	1.38	2.13	2.91	3.72	4.54	5.19	5.19
Total %	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

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Morningstar® Lifetime Allocation Indexes

Conservative Summary Allocations

Data as of June 2021.

Target Retirement Year:	2065	2060	2055	2050	2045	2040	2035	2030	2025	2020	2015	2010	2005	2000
Stocks %	84.98	84.53	83.16	79.31	71.84	60.89	49.91	41.37	35.25	30.31	26.32	23.71	22.61	22.61
U.S. %	48.19	49.06	49.38	48.19	44.69	38.81	32.61	27.68	24.12	21.20	18.80	17.26	16.70	16.70
Non-U.S. %	36.78	35.47	33.78	31.12	27.15	22.08	17.30	13.69	11.12	9.11	7.52	6.44	5.91	5.91
Morningstar Large Value	9.50	9.90	10.20	10.17	9.60	8.46	7.18	6.17	5.44	4.84	4.35	4.07	4.00	4.00
Morningstar Large Core	8.03	8.34	8.57	8.51	8.01	7.03	5.95	5.09	4.48	3.97	3.56	3.32	3.26	3.26
Morningstar Large Growth	6.79	6.96	7.05	6.91	6.41	5.54	4.63	3.90	3.38	2.95	2.61	2.39	2.32	2.32
Morningstar Mid Value	4.07	4.24	4.37	4.36	4.12	3.62	3.08	2.64	2.33	2.08	1.87	1.74	1.72	1.72
Morningstar Mid Core	3.44	3.58	3.67	3.65	3.43	3.01	2.55	2.18	1.92	1.70	1.53	1.42	1.40	1.40
Morningstar Mid Growth	2.91	2.98	3.02	2.96	2.75	2.38	1.98	1.67	1.45	1.27	1.12	1.02	0.99	0.99
Morningstar Small Value	3.98	3.87	3.71	3.43	3.00	2.44	1.90	1.49	1.20	0.97	0.78	0.65	0.58	0.58
Morningstar Small Core	3.46	3.36	3.22	2.98	2.61	2.12	1.65	1.30	1.04	0.84	0.68	0.56	0.50	0.50
Morningstar Small Growth	3.04	2.96	2.83	2.62	2.29	1.86	1.45	1.14	0.91	0.74	0.59	0.49	0.44	0.44
Morningstar US REIT	2.98	2.85	2.73	2.60	2.48	2.35	2.23	2.10	1.98	1.85	1.73	1.60	1.50	1.50
Morningstar Dev Mkts ex-US	25.45	24.90	24.05	22.47	19.87	16.38	13.01	10.43	8.59	7.12	5.96	5.17	4.79	4.79
Morningstar Emerging Mkts	11.33	10.57	9.73	8.65	7.28	5.70	4.29	3.26	2.54	1.99	1.56	1.28	1.12	1.12
Bonds %	15.02	15.47	16.84	20.50	26.61	35.12	42.57	46.96	48.64	48.81	47.78	45.45	42.78	42.78
U.S. %	11.90	12.38	13.62	16.73	21.73	28.68	34.76	38.33	39.67	39.75	38.85	36.87	34.61	34.61
Non-U.S. %	3.13	3.09	3.21	3.77	4.88	6.44	7.81	8.64	8.97	9.05	8.93	8.58	8.16	8.16
Morningstar Long-Term Core	8.80	9.00	8.99	10.03	12.25	15.01	16.60	16.28	14.44	11.65	8.11	3.96	0.35	0.35
Morningstar Intermediate Core	2.34	2.56	3.51	5.07	7.18	10.36	13.76	16.70	19.11	21.29	23.29	24.93	25.96	25.96
Morningstar Short-Term Core	0.75	0.82	1.12	1.62	2.30	3.31	4.40	5.34	6.11	6.81	7.45	7.98	8.31	8.31
Morningstar Gbl Ex US Govt Bond	0.94	0.94	0.99	1.17	1.54	2.05	2.51	2.81	2.95	3.00	2.99	2.91	2.79	2.79
Morningstar EM Sovereign Bond	2.19	2.15	2.22	2.60	3.35	4.39	5.30	5.83	6.03	6.05	5.93	5.67	5.38	5.38
Inflation Hedge %	0.00	0.00	0.00	0.15	1.27	3.27	6.16	9.57	13.21	17.13	21.24	25.29	28.38	28.38
Commodities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Morningstar Long-Term TIPS	0.00	0.00	0.00	0.15	1.27	3.27	6.16	8.92	10.08	10.17	9.02	6.46	3.41	3.41
Morningstar Short-Term TIPS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.65	3.13	6.96	12.22	18.84	24.98	24.98
Cash %	0.00	0.00	0.00	0.03	0.28	0.72	1.35	2.10	2.90	3.76	4.66	5.55	6.23	6.23
Total %	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

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