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## 401(k) Allocation Recommendations for Existing Clients

Marathon 401(k) Q3/2021

<u>Moderately</u>		
Conse	rvative	Allocation

20%—Vanguard Value Index

10%—Fidelity 500 Index

4%—Fidelity Extended Market Index

3%—Fidelity Low PR Stock

5%—Vanguard Small Cap Index

2%—Fidelity International Discovery

2%—DFA Emerging Markets

14%—Dodge & Cox Income Fund

9%—Stable Value Fund

6%—FIMM Govt Inst

## **Moderate Allocation**

25%—Fidelity Growth

20%—Vanguard Value Index

16%—Fidelity 500 Index

5%—Fidelity Extended Market Index

4%—Fidelity Low PR Stock

6%—Vanguard Small Cap Index

4%—Fidelity International Discovery

4%—DFA Emerging Markets

12%—Dodge & Cox Income Fund

4%—Stable Value Fund

## Moderately Aggressive Allocation

25%—Fidelity Growth

20%—Vanguard Value Index

18%—Fidelity 500 Index

6%—Fidelity Extended Market Index

5%—Fidelity Low PR Stock

6%—Vanguard Small Cap Index

5%—Fidelity International Discovery

5%—DFA Emerging Markets

10%—Dodge & Cox Income Fund

Investing in institutional funds within the Marathon 401(k) plan is subject to risk and potential loss of principal. There is no assurance or certainty that any investment or strategy will be successful in meeting its objectives. Investors should consider the investment objectives, risks, charges, and expenses of the funds carefully before investing. The Investment Options Guide, the most recent quarterly investment performance statements, and the Summary Plan Descriptions contain this and other information about the funds. Contact Fidelity directly at (800)835-5095 to obtain a copy of this information which should be read carefully before investing or sending money.