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401(k) Allocation Recommendations for Existing Clients

BP 401(k) Q3/2023

Moderately Conservative Allocation

14%——Equity Index – Growth

22%——Equity Index – Value

15%——S&P 500 Index

1%——Small/Mid Cap Equity Index

1%——International Equity Index

1%——Emerging Markets

10%——Real Assets Income

12%——Income Fund

4%——US Fixed Income –Short Duration

20%——Short-Term Investment Fund

Moderate Allocation

17%——Equity Index – Growth

22%——Equity Index – Value

18%——S&P 500 Index

2%——Emerging Markets

2%——Small/Mid Cap Equity Index

2%——International Equity Index

10%——Real Assets Income

12%——Income Fund

15%——Short-Term Investment Fund

Moderately Aggressive Allocation

20%——Equity Index – Growth

20%——Equity Index – Value

20%——S&P 500 Index

3%——Emerging Markets

3%——Small/Mid Cap Equity Index

3%——International Equity Index

10%——Real Assets Income

10%——Income Fund

11%——Short-Term Investment Fund

Investing in institutional funds within the BP 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.

If you do not know your risk tolerance and which of the above allocations is most suitable for you, please visit our website at www.cwabellingham.com to use our free risk assessment tool.