

# 401(k) Allocation Recommendations for Existing Clients

## Hilcorp 401(k) Q4/2023

### Moderately Conservative Allocation

|                                  |
|----------------------------------|
| 15%—Fidelity 500 Index           |
| 14%—JP Morgan Large Cap Growth   |
| 22%—Vanguard Selected Value      |
| 15%—Dodge & Cox Income           |
| 20%—Vanguard Short Term          |
| 11%—US Treasury Money Fund       |
| 1%—Invesco Developing Mkts       |
| 1%—Vanguard Small Cap Index      |
| 1%—American Funds EuroPac Growth |

### Moderate Allocation

|                                  |
|----------------------------------|
| 18%—Fidelity 500 Index           |
| 17%—JP Morgan Large Cap Growth   |
| 22%—Vanguard Selected Value      |
| 15%—Dodge & Cox Income           |
| 15%—Vanguard Short Term          |
| 7%—US Treasury Money Fund        |
| 2%—Invesco Developing Mkts       |
| 2%—Vanguard Small Cap Index      |
| 2%—American Funds EuroPac Growth |

### Moderately Aggressive Allocation

|                                  |
|----------------------------------|
| 20%—Fidelity 500 Index           |
| 20%—JP Morgan Large Cap Growth   |
| 20%—Vanguard Selected Value      |
| 15%—Dodge & Cox Income           |
| 11%—Vanguard Short Term          |
| 5%—US Treasury Money Fund        |
| 3%—Invesco Developing Mkts       |
| 3%—Vanguard Small Cap Index      |
| 3%—American Funds EuroPac Growth |

*Investing in institutional funds within the Hilcorp 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 T.Rowe Price directly at (800)922-9945 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](http://www.cwabellingham.com) to use our free risk assessment tool.*