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401(k) Allocation Recommendations for Existing Clients

Marathon 401(k) Q4/2024

Moderately Conservative Allocation

16%——Fidelity Contrafund
21%——Vanguard Value Index
19%——S&P 500 Index
12%——Dodge & Cox Income Fund
8%——Stable Value Fund
15%——FIMM Govt Inst
3%——DFA Emerging Markets
3%——Vanguard SmallCap Index
3%——Fidelity International Index

Moderate Allocation

20%——Fidelity Contrafund
21%——Vanguard Value Index
22%——S&P 500 Index
11%——Dodge & Cox Income Fund
5%——Stable Value Fund
9%——FIMM Govt Inst
4%——DFA Emerging Markets
5%——Vanguard SmallCap Index
3%——Fidelity International Index

Moderately Aggressive Allocation

24%——Fidelity Contrafund
19%——Vanguard Value Index
24%——S&P 500 Index
5%——Stable Value Fund
8%——Dodge & Cox Income Fund
5%——FIMM Govt Inst
5%——DFA Emerging Markets
6%——Vanguard SmallCap Index
4%——Fidelity International Index

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.

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.