

# 401(k) Allocation Recommendations for Existing Clients

## Marathon 401(k) Q4/2023

### Moderately Conservative Allocation

14%—Fidelity Contrafund
22%—Vanguard Value Index
15%—S&P 500 Index
12%—Dodge & Cox Income Fund
10%—Stable Value Fund
24%—FIMM Govt Inst
1%—DFA Emerging Markets
1%—Vanguard SmallCap Index
1%—Fidelity International Index

### Moderate Allocation

17%—Fidelity Contrafund
22%—Vanguard Value Index
18%—S&P 500 Index
12%—Dodge & Cox Income Fund
10%—Stable Value Fund
15%—FIMM Govt Inst
2%—DFA Emerging Markets
2%—Vanguard SmallCap Index
2%—Fidelity International Index

### Moderately Aggressive Allocation

20%—Fidelity Contrafund
20%—Vanguard Value Index
20%—S&P 500 Index
10%—Stable Value Fund
10%—Dodge & Cox Income Fund
11%—FIMM Govt Inst
3%—DFA Emerging Markets
3%—Vanguard SmallCap Index
3%—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](http://www.cwabellingham.com) to use our free risk assessment tool.*