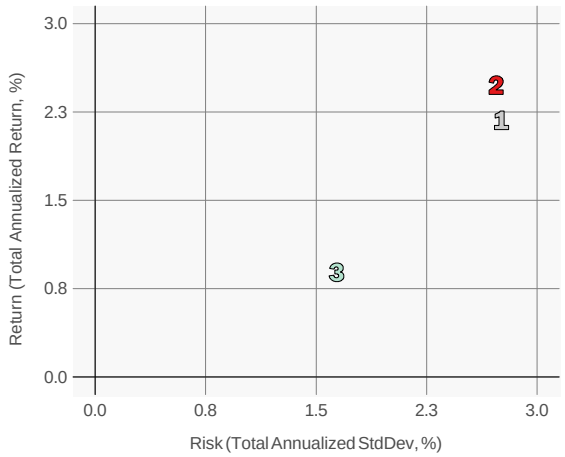
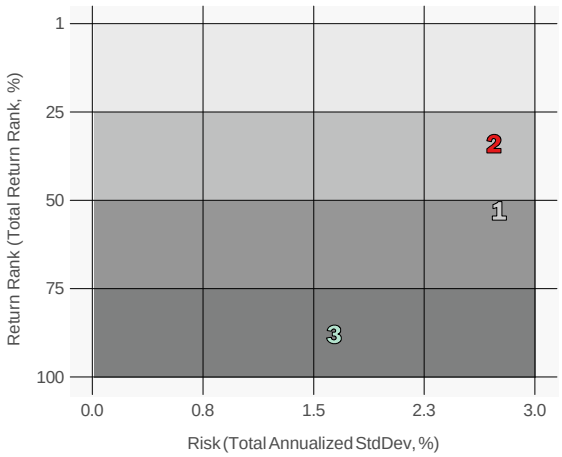
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Fixed Income								
1 Oppenheimer Total Return Bond R	**OPBNX**	**2.18**	**-0.06**	**2.76**	**0.81**	**-0.07**	**0.65**	**51**
BB Aggregate Bond		2.24	0.00	2.81	0.00		0.66	63
Intermediate-Term Bond Median (942 funds)		*2.21*	*-0.03*	*2.76*	*0.98*	*-0.05*	*0.68*	*50*
2 AB Global Bond R	**ANARX**	**2.48**	**0.49**	**2.72**	**7.05**	**0.07**	**0.76**	**14**
Citi WGBI NonUSD USD		1.99	0.00	7.75	0.00		0.24	96
World Bond Median (289 funds)		*2.02*	*0.03*	*4.96*	*5.38*	*0.01*	*0.34*	*50*
3 American Century Short Dur Inf PrBd A	**APOAX**	**0.89**	**-1.16**	**1.64**	**2.29**	**-0.51**	**0.30**	**6**
BB TIPS		2.05	0.00	3.51	0.00		0.48	49
Inflation-Protected Bond Median (228 funds)		*1.57*	*-0.48*	*3.55*	*0.94*	*-0.38*	*0.37*	*50*

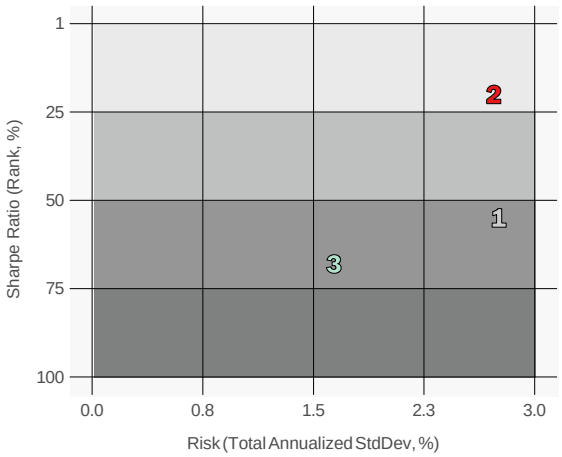
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



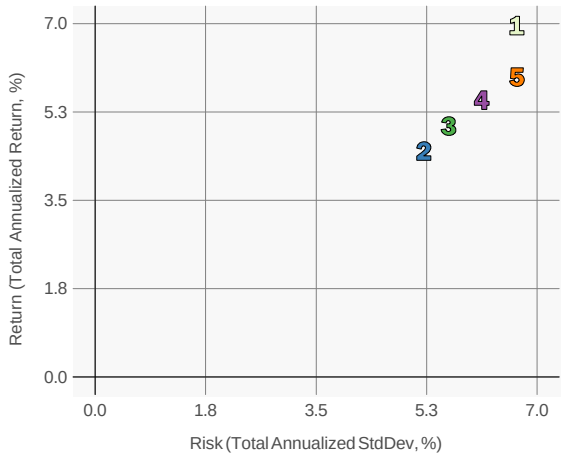
All statistics based on a 36 month time period.

as of 12/31/2017

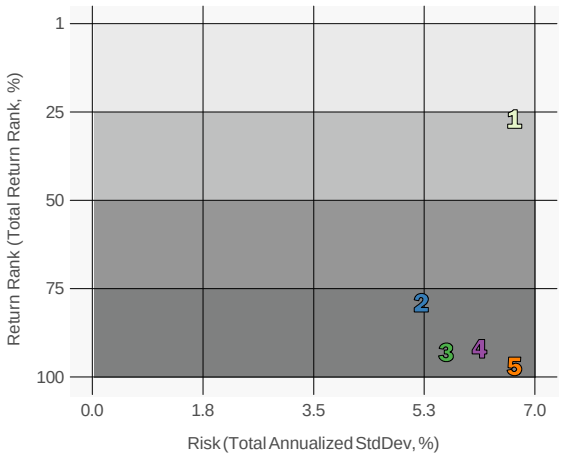
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Balanced								
1 Janus Henderson Balanced R	**JDBRX**	**6.96**	**-0.84**	**6.68**	**2.04**	**-0.41**	**0.99**	**59**
60% S&P500 / 40% BBCap Agg Bond		7.80	0.00	5.93	0.00		1.23	18
Allocation--50% to 70% Equity Median (786 funds)		*6.33*	*-1.47*	*6.53*	*2.02*	*-0.75*	*0.92*	*50*
2 American Century One Choice 2020 R	**ARBRX**	**4.48**	**-0.47**	**5.20**	**2.13**	**-0.22**	**0.79**	**27**
DJ US 2020 Target Index		4.95	0.00	3.61	0.00		1.25	6
Target-Date 2020 Median (215 funds)		*5.84*	*0.90*	*5.51*	*2.59*	*0.33*	*0.96*	*50*
3 American Century One Choice 2025 R	**ARWRX**	**4.97**	**-1.10**	**5.59**	**1.45**	**-0.76**	**0.83**	**16**
DJ US 2025 Target Index		6.07	0.00	4.84	0.00		1.16	4
Target-Date 2025 Median (191 funds)		*6.68*	*0.61*	*6.59*	*2.49*	*0.24*	*0.96*	*50*
4 American Century One Choice 2030 R	**ARCRX**	**5.48**	**-1.59**	**6.12**	**1.52**	**-1.05**	**0.84**	**15**
DJ US 2030 Target Index		7.08	0.00	6.24	0.00		1.07	19
Target-Date 2030 Median (215 funds)		*7.32*	*0.24*	*7.43*	*2.44*	*0.10*	*0.93*	*50*
5 American Century One Choice 2035 R	**ARYRX**	**5.94**	**-2.08**	**6.68**	**2.04**	**-1.02**	**0.84**	**3**
DJ US 2035 Target Index		8.02	0.00	7.55	0.00		1.01	16
Target-Date 2035 Median (191 funds)		*8.04*	*0.02*	*8.32*	*2.54*	*0.01*	*0.93*	*50*

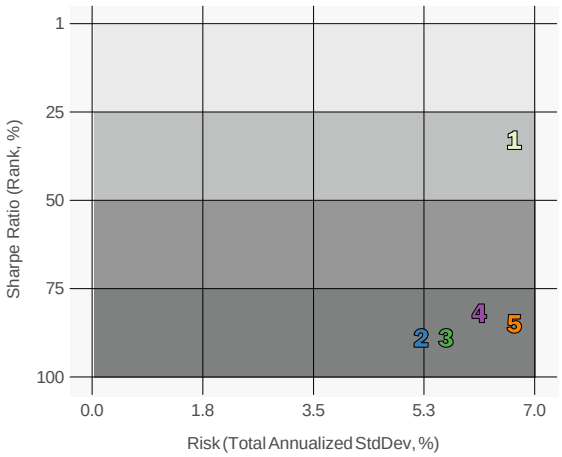
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



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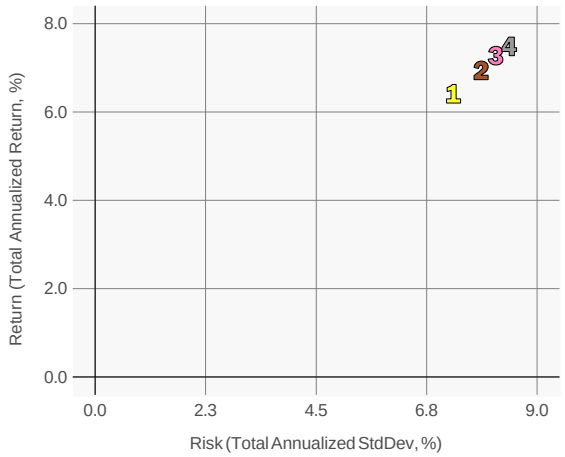
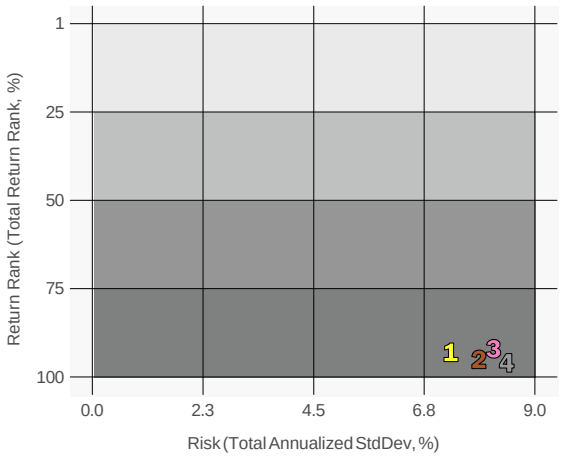
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Balanced								
1 American Century One Choice 2040 R	**ARDRX**	**6.42**	**-2.38**	**7.30**	**2.55**	**-0.93**	**0.84**	**10**
DJ US 2040 Target Index		8.80	0.00	8.61	0.00		0.98	48
Target-Date 2040 Median (215 funds)		*8.25*	*-0.55*	*8.64*	*2.75*	*-0.18*	*0.93*	*50*
2 American Century One Choice 2045 R	**ARORX**	**6.94**	**-2.40**	**7.86**	**2.80**	**-0.86**	**0.84**	**2**
DJ US 2045 Target Index		9.34	0.00	9.31	0.00		0.97	76
Target-Date 2045 Median (191 funds)		*8.68*	*-0.66*	*9.01*	*2.93*	*-0.23*	*0.93*	*50*
3 American Century One Choice 2050 R	**ARFWX**	**7.27**	**-2.32**	**8.15**	**2.85**	**-0.81**	**0.86**	**9**
DJ US 2050 Target Index		9.60	0.00	9.56	0.00		0.97	87
Target-Date 2050 Median (211 funds)		*8.60*	*-1.00*	*9.05*	*3.10*	*-0.31*	*0.93*	*50*
4 American Century One Choice 2055 R	**AREOX**	**7.49**	**-2.12**	**8.43**	**2.72**	**-0.78**	**0.85**	**3**
DJ US 2055 Target Index		9.61	0.00	9.56	0.00		0.97	87
Target-Date 2055 Median (184 funds)		*8.81*	*-0.80*	*9.22*	*3.00*	*-0.28*	*0.93*	*50*

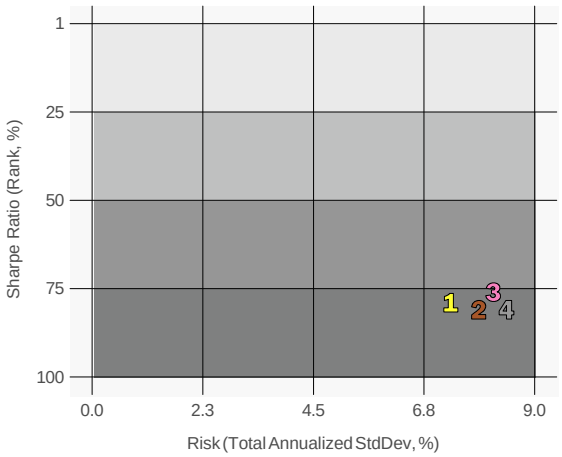
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



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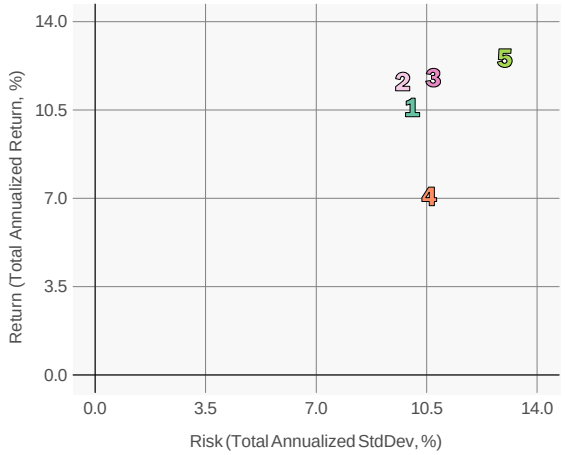
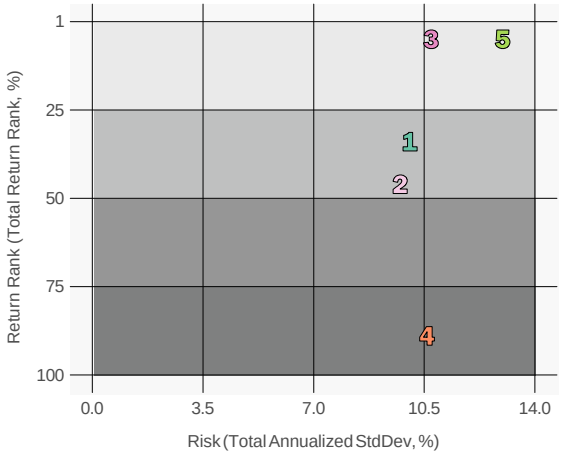
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Equity								
1 Principal Large Cap S&P 500 Index R3	**PLFMX**	**10.61**	**-0.62**	**10.05**	**0.58**	**-1.08**	**1.02**	**34**
Russell 1000 Index		11.23	0.00	10.11	0.00		1.07	46
Large Blend Median (1273 funds)		*10.03*	*-1.20*	*10.21*	*2.48*	*-0.52*	*0.94*	*50*
2 Franklin Growth R	**FGSRX**	**11.63**	**-2.16**	**9.74**	**2.39**	**-0.90**	**1.14**	**6**
Russell 1000 Growth Index		13.79	0.00	10.69	0.00		1.23	28
Large Growth Median (1339 funds)		*11.33*	*-2.46*	*11.30*	*3.68*	*-0.75*	*0.99*	*50*
3 Victory Sycamore Established Value R	**GETGX**	**11.79**	**2.79**	**10.71**	**3.62**	**0.77**	**1.06**	**36**
Russell Mid-Cap Value Index		9.00	0.00	10.47	0.00		0.84	24
Mid-Cap Value Median (388 funds)		*8.42*	*-0.58*	*11.25*	*3.76*	*-0.17*	*0.71*	*50*
4 Prudential Jennison Mid-Cap Growth R	**JDERX**	**7.08**	**-3.22**	**10.59**	**2.92**	**-1.10**	**0.66**	**15**
Russell Mid-Cap Growth Index		10.30	0.00	11.04	0.00		0.91	33
Mid-Cap Growth Median (598 funds)		*9.66*	*-0.63*	*11.70*	*4.02*	*-0.17*	*0.81*	*50*
5 Victory Sycamore Small Company Opp R	**GOGFX**	**12.55**	**3.01**	**12.98**	**3.37**	**0.89**	**0.95**	**24**
Russell 2000 Value Index		9.55	0.00	14.17	0.00		0.68	57
Small Value Median (366 funds)		*8.76*	*-0.79*	*13.98*	*3.70*	*-0.22*	*0.64*	*50*

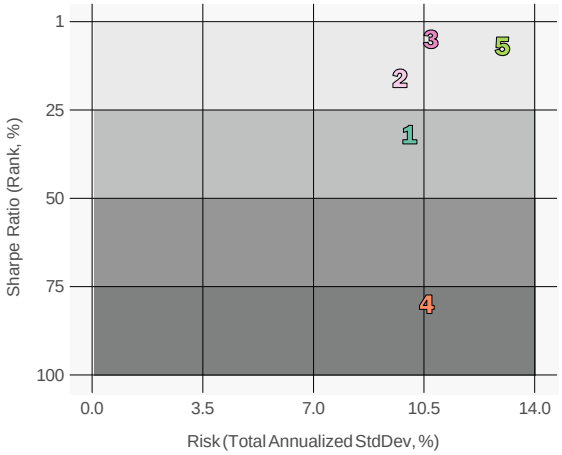
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



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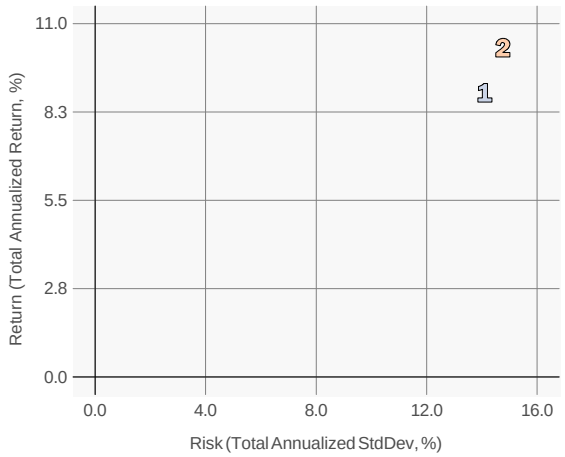
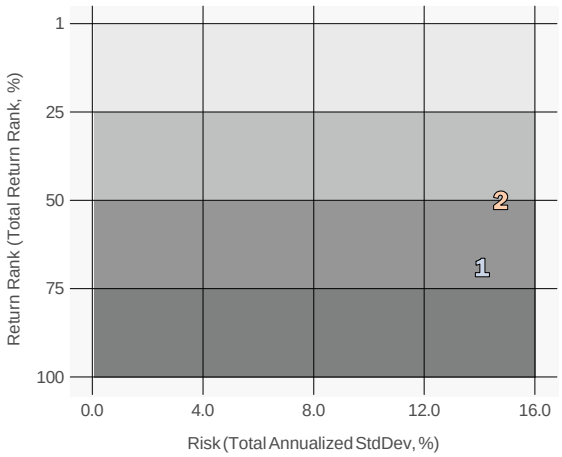
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Equity								
1 Buffalo Small Cap	**BUFSX**	**8.85**	**-1.43**	**14.11**	**4.61**	**-0.31**	**0.64**	**58**
Russell 2000 Growth Index		10.28	0.00	14.80	0.00		0.71	72
Small Growth Median (697 funds)		*9.98*	*-0.30*	*13.78*	*4.83*	*-0.07*	*0.75*	*50*
2 BlackRock Russell 2000 Growth F		**10.26**	**-0.02**	**14.76**	**0.33**	**-0.07**	**0.71**	**62**
Russell 2000 Growth Index		10.28	0.00	14.80	0.00		0.71	81
Small Growth Median (35 funds)		*10.26*	*-0.02*	*14.22*	*3.65*	*-0.07*	*0.72*	*50*

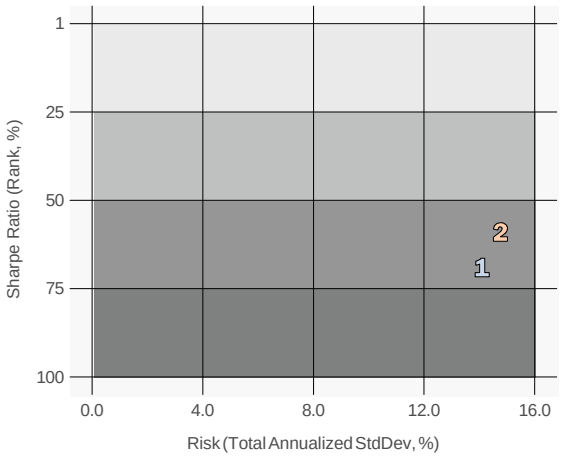
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



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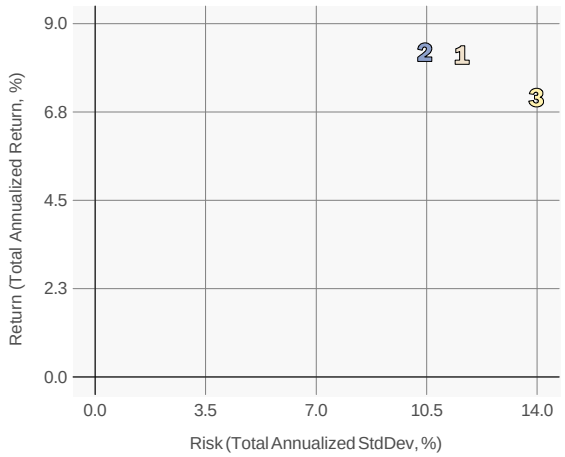
as of 12/31/2017

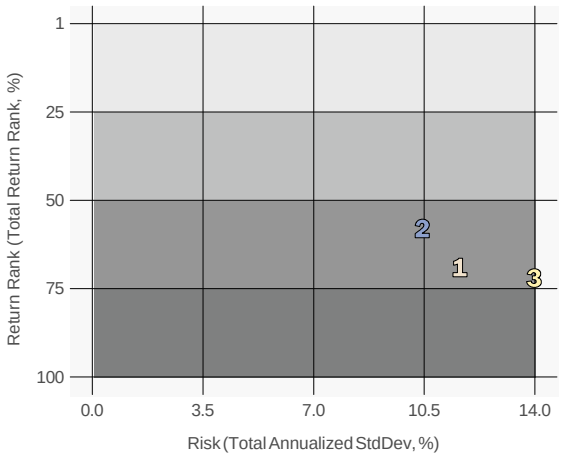
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr)

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
International								
1 Oppenheimer International Growth R	**OIGNX**	**8.20**	**-1.09**	**11.63**	**3.84**	**-0.28**	**0.70**	**66**
MSCI AC World Index ex USA Growth ND USD		9.29	0.00	11.73	0.00		0.78	70
Foreign Large Growth Median (367 funds)		*9.11*	*-0.18*	*11.32*	*4.00*	*-0.05*	*0.78*	*50*
2 Putnam Global Equity A	**PEQUX**	**8.27**	**-0.99**	**10.44**	**3.26**	**-0.30**	**0.78**	**48**
MSCI The World Index ND USD		9.26	0.00	10.38	0.00		0.87	46
World Large Stock Median (795 funds)		*8.66*	*-0.61*	*10.47*	*3.74*	*-0.14*	*0.83*	*50*
3 Oppenheimer Developing Markets R	**ODVNX**	**7.12**	**-1.99**	**13.97**	**4.94**	**-0.40**	**0.53**	**45**
MSCI EM (Emerging Markets) ND USD		9.10	0.00	15.57	0.00		0.61	82
Diversified Emerging Mkts Median (685 funds)		*8.62*	*-0.48*	*14.26*	*4.98*	*-0.11*	*0.62*	*50*

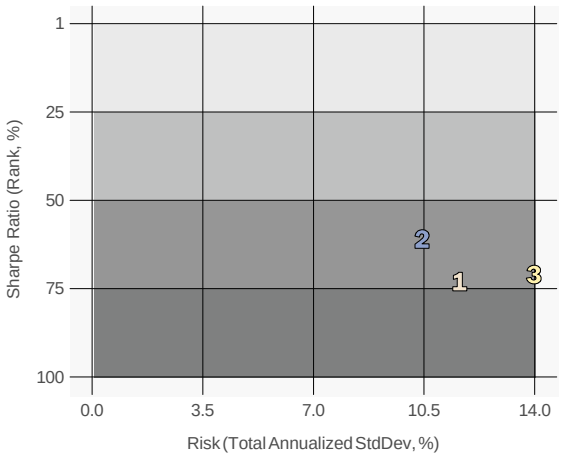
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



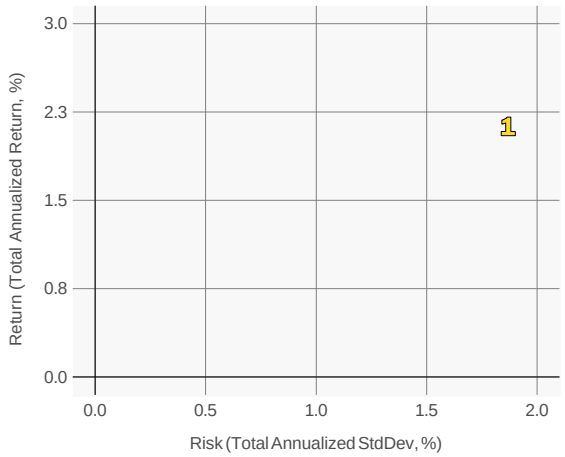
All statistics based on a 36 month time period.

as of 12/31/2017

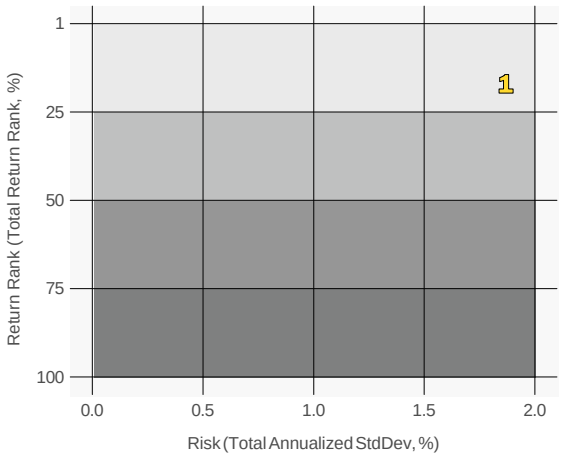
Sample UBS Investment Monitoring Report
Risk Analysis (3Yr): Proposed Funds

	Ticker	3 Yr Return Total	3 Yr Return Excess	3 Yr Std Dev Total	3 Yr Std Dev Excess	Info Ratio	Sharpe Ratio	3 Yr Std Dev Rank
Fixed Income								
1 Eaton Vance Short Dur Infl-Prot Inc A	**EARRX**	**2.13**	**0.08**	**1.87**	**2.83**	**0.03**	**0.92**	**12**
BB TIPS		2.05	0.00	3.51	0.00		0.48	49
Inflation-Protected Bond Median (228 funds)		*1.57*	*-0.48*	*3.55*	*0.94*	*-0.38*	*0.37*	*50*

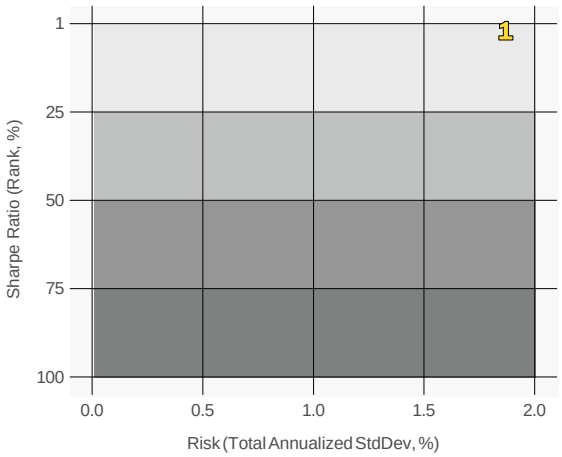
RISK / RETURN (3-Year)



RISK / RETURN PEER RANK (3-Year)



RISK / SHARPE RATIO PEER RANK (3-Year)



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