1 Inception Date: The investment must have at least a 3 year track history.
2 Manager Tenure: The investment manager must have at least a 2 year track history. (Most senior manager's tenure)
3 Assets: The investment must have at least 75 million under management. (Total across all share classes for funds/etfs)
4 Composition: The investment's allocation to its primary asset class should be greater than or equal to 80%. (Not applied to all peer groups)
5 Style: The investment's current style box should match the peer group. (Not applied to all peer groups)
6 Prospectus Net Exp Ratio: The investment must place in the top 75% of its peer group.
7 Alpha: The investment must place in the top 50% of its peer group.
8 Sharpe: The investment must place in the top 50% of its peer group.
9 1 Year Return: The investment must place in the top 50% of its peer group.
10 3 Year Return: The investment must place in the top 50% of its peer group.
11 5 Year Return: The investment must place in the top 50% of its peer group.

Legend	
√	Investment meets the criterion
X	Investment does not meet the criterion
N/App	Investment is not screened on the criterion

Investment Name	Peer Group		fi360 Fiduciary Score Average					fi360 Fiduciary Score Criteria											Action
			Score	1 Yr	3 Yr	5 Yr	10 Yr	1	2	3	4	5	6	7	8	9	10	11	
DFA US large Company I (DFUSX)	Large Blend		0	0	1	1	6	√	√	√	√	√	√	√	√	√	√	√	
		# of Peers	1,331	1,243	1,100	1,013	561												
DFA US Large Cap Value (DFLVX)	Large Value		17	11	17	15	18	√	√	√	√	√	√	√	√	x	√	√	
		# of Peers	1,109	1,030	935	847	447												
Vanguard Small Cap Value Index Admiral	Small Value		0	0	4	-	-	√	√	√	√	√	√	√	√	√	√	√	
		# of Peers	361	318	274														
DFA US Small Cap I (DFSTX)	Small Blend		16	3	2	1	14	√	√	√	√	√	√	√	√	x	√	√	
		# of Peers	634	581	530	476	233												
DFA Global Equity I (DGEIX)	World Stock		0	0	1	8	-	√	√	√	*N/App*	*N/App*	√	√	√	√	√	√	
		# of Peers	834	730	609	489													
DFA Large Cap International I (DFALX)	Foreign Large Blend		7	3	7	8	7	√	√	√	√	√	√	x	√	√	√	√	
		# of Peers	645	595	533	426	203												
DFA Emerging Markets I (DFEMX)	Diversified Emerging Mkts		15	11	9	5	12	√	√	√	√	*N/App*	√	x	√	√	√	√	
		# of Peers	548	416	326	238	115												
Vanguard REIT Index Adm (VGSLX)	Real Estate		0	3	1	1	17	√	√	√	*N/App*	*N/App*	√	√	√	√	√	√	
		# of Peers	243	214	192	174	83												
Fidelity Total Bond (FTBFX)	Intermediate-Term Bond		0	7	7	9	-	√	√	√	√	√	√	√	√	√	√	√	
		# of Peers	895	846	737	675													
TIAA-CREF Inflation Link Bd Instl (TIILX)	Inflation-Protected Bond		0	1	2	4	-	√	√	√	√	√	√	√	√	√	√	√	
		# of Peers	193	181	141	129													
DFA Short-Term Government I (DFFGX)	Short Government		0	0	3	8	32	√	√	√	*N/App*	√	√	√	√	√	√	√	
		# of Peers	117	111	98	95	70												
DFA Commodity Strategy I (DCMSX)	Commodities Broad Basket		0	4	-	-	-	√	√	√	*N/App*	*N/App*	√	√	√	√	√	√	
		# of Peers	104	84															
Vanguard LifeStrategy Cnsrv Gr Inv (VSCGX)	Conservative Allocation		0	3	26	30	19	√	√	√	*N/App*	*N/App*	√	√	√	√	√	√	
		# of Peers	551	474	416	363	118												
Vanguard LifeStrategy Income Inv (VASIX)	Conservative Allocation		50	53	46	35	28	√	√	√	*N/App*	*N/App*	√	√	√	√	X	X	Watch
		# of Peers	551	474	416	363	118												
Vanguard LifeStrategy Moderate Gr Inv (VSMGX)	Moderate Allocation		45	47	37	32	17	√	√	√	*N/App*	*N/App*	√	√	√	√	X	X	Watch
		# of Peers	693	641	567	532	275												
Vanguard Prime Money Market Inv (VMMXX)	Money Market Taxable		0	0	0	-	-	√	√	√	*N/App*	*N/App*	√	*N/Av*	√	√	√	√	
		# of Peers	895	872	764														