

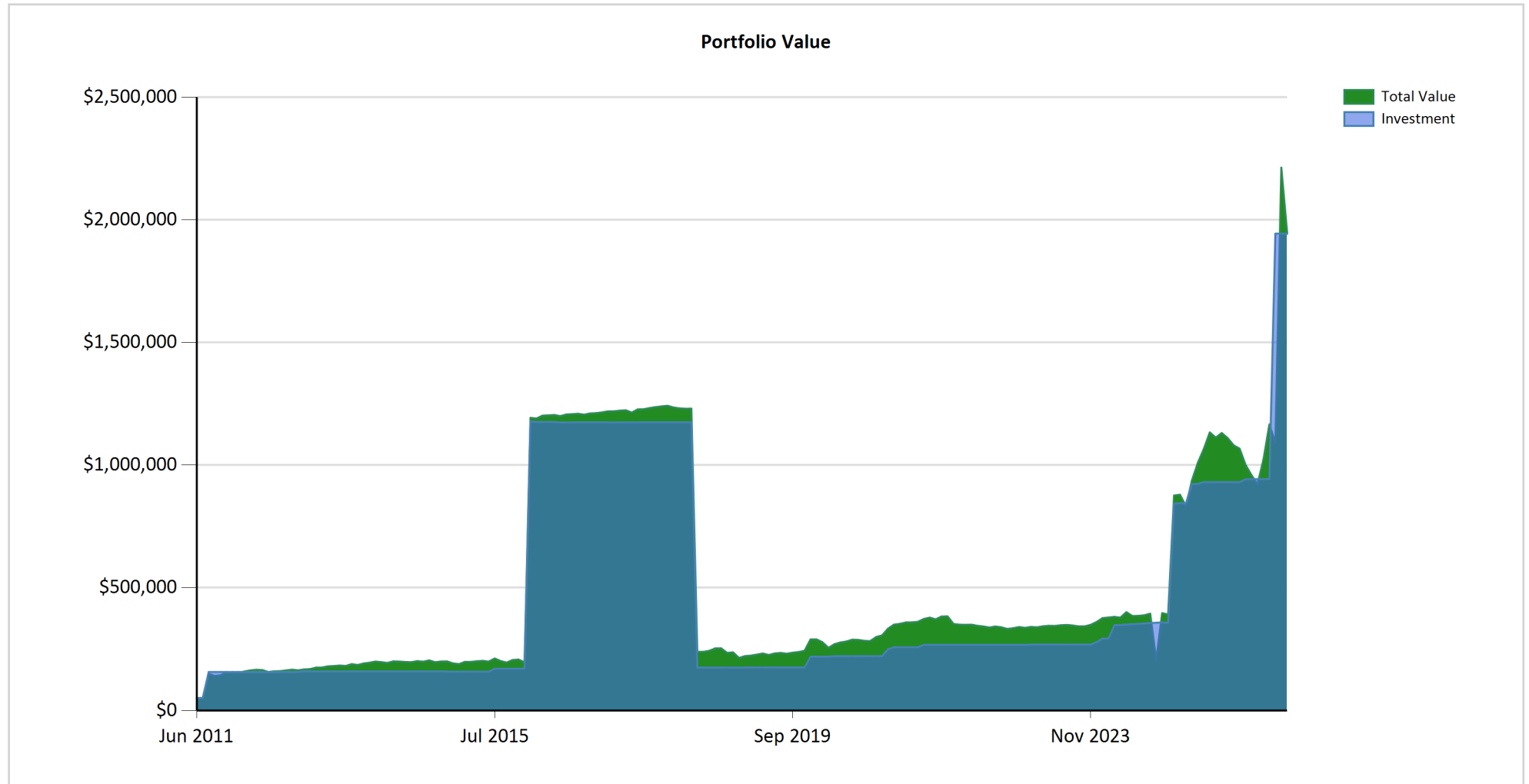


Account Performance History

The Anderson Family

Performance Beginning:
6/28/2011

Performance Ending:
8/26/2026





Account Performance History

The Anderson Family

Performance Beginning:
6/28/2011

Performance Ending:
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Portfolio Returns

Portfolio	Current Quarter	Year To Date	1 Year	3 Years	Since Inception (6/28/2011)
Beginning Value	\$1,090,068.58	\$1,067,054.92	\$1,133,229.95	\$348,449.13	\$50,000.00
Ending Value	\$1,942,689.98	\$1,942,689.98	\$1,942,689.98	\$1,942,689.98	\$1,942,689.98
Net Change	\$852,621.40	\$875,635.06	\$809,460.03	\$1,594,240.85	\$1,892,689.98
Basic Return for Entire Portfolio	78.22%	79.84%	69.46%	23.12%	4.87%

Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Account # XXXXX3456 - Test Account (Test Annuity Company) (Since Inception 12/31/2019)					
Beginning Value	\$49,900.50	\$49,900.50	\$50,000.50	\$44,000.00	\$44,000.00
Ending Value	\$49,900.50	\$49,900.50	\$49,900.50	\$49,900.50	\$49,900.50
Net Change	-\$0.00	-\$0.00	-\$100.00	\$5,900.50	\$5,900.50
Basic Return for Acct Num XXXXX3456	0.00%	0.00%	-0.20%	-19.31%	-9.43%

Account # XXXXX5645 - Bob's IRA (Pershing) (Since Inception 11/01/2012)					
Beginning Value	\$37,635.27	\$42,261.87	\$43,920.75	\$32,610.17	\$2,500.00
Ending Value	\$37,577.44	\$37,577.44	\$37,577.44	\$37,577.44	\$37,577.44
Net Change	-\$57.83	-\$4,684.43	-\$6,343.31	\$4,967.27	\$35,077.44
Basic Return for Acct Num XXXXX5645	-0.15%	-11.08%	-14.44%	4.72%	4.49%
SPDR Bloomberg Barclays 1-3 Month T-Bill ETF (BIL)	0.57%	2.32%	4.05%	4.54%	1.47%



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Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Account # XXXXX6345 - Fixed (American Funds) (Since Inception 01/01/2016)					
Beginning Value	\$29,900.00	\$29,900.00	\$29,900.00	\$19,900.00	\$1,000,000.00
Ending Value	\$29,900.00	\$29,900.00	\$29,900.00	\$29,900.00	\$29,900.00
Net Change	-\$0.00	-\$0.00	-\$0.00	\$10,000.00	-\$970,100.00
Basic Return for Acct Num XXXXX6345	0.00%	0.00%	0.00%	0.00%	3.85%
Account # XXXXX4764 - Bob's Roth (TradePMR) (Since Inception 01/14/2016)					
Beginning Value	\$17,812.72	\$17,340.22	\$15,604.39	\$15,304.15	\$5,175.04
Ending Value	\$18,664.30	\$18,664.30	\$18,664.30	\$18,664.30	\$18,664.30
Net Change	\$851.58	\$1,324.08	\$3,059.91	\$3,360.15	\$13,489.26
Basic Return for Acct Num XXXXX4764	4.78%	7.64%	19.61%	-14.59%	-3.78%
Dow Jones U.S. Real Estate Index	3.08%	11.45%	10.12%	5.26%	3.65%
Account # XXXXX42.3 - Joint Account (Betterment) (Since Inception 01/31/2025)					
Beginning Value	\$450,276.80	\$558,376.40	\$596,236.20	N/A	\$483,935.20
Ending Value	\$461,600.00	\$461,600.00	\$461,600.00	N/A	\$461,600.00
Net Change	\$11,323.20	-\$96,776.40	-\$134,636.20	N/A	-\$22,335.20
Basic Return for Acct Num XXXXX42.3	2.51%	-17.33%	-22.58%	N/A	-2.98%
Dow Jones U.S. Real Estate Index	3.08%	11.45%	10.12%	5.26%	3.65%
Account # XXXXX43.1 - Laura's 401k (Charles Schwab) (Since Inception 07/01/2011)					
Beginning Value	\$223,976.27	\$167,349.91	\$184,917.89	\$155,046.93	\$100,000.00



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Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Ending Value	\$145,711.82	\$145,711.82	\$145,711.82	\$145,711.82	\$145,711.82
Net Change	-\$78,264.44	-\$21,638.08	-\$39,206.07	-\$9,335.10	\$45,711.83
Basic Return for Acct Num XXXXX43.1	-34.94%	-12.93%	-21.20%	-2.27%	0.75%
Consumer Discret Sel Sect SPDR ETF	0.57%	-0.83%	-46.32%	-11.09%	8.73%
Account # XXXXX3543 - Robert's 401k (Charles Schwab) (Since Inception 06/28/2011)					
Beginning Value	\$84,096.72	\$84,096.72	\$84,096.72	\$79,586.88	\$50,000.00
Ending Value	\$87,706.57	\$87,706.57	\$87,706.57	\$87,706.57	\$87,706.57
Net Change	\$3,609.84	\$3,609.84	\$3,609.84	\$8,119.68	\$37,706.57
Basic Return for Acct Num XXXXX3543	4.29%	4.29%	4.29%	3.12%	3.72%
DFA Global Allocation 60/40 I	1.70%	10.01%	23.44%	17.35%	8.54%
Account # XXXXX2345 - Bob's CD (Test CD Company) (Since Inception 12/31/2022)					
Beginning Value	\$80,200.30	\$103,979.30	\$114,703.50	\$1.00	\$1.00
Ending Value	\$81,419.35	\$81,419.35	\$81,419.35	\$81,419.35	\$81,419.35
Net Change	\$1,219.05	-\$22,559.95	-\$33,284.15	\$81,418.35	\$81,418.35
Basic Return for Acct Num XXXXX2345	1.52%	-21.70%	-29.02%	-1.93%	-1.63%



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Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Account # XXXXX1kHA - Bob's Employer 401(k) held away (Pontera) (Since Inception 01/01/2021)					
Beginning Value	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
Ending Value	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
Net Change	-\$0.00	-\$0.00	-\$0.00	-\$0.00	\$0.00
Basic Return for Acct Num XXXXX1kHA	0.00%	0.00%	0.00%	0.00%	0.00%
Account # XXXXXETF - Inherited Pension ETF (fidelity) (Since Inception 01/02/2024)					
Beginning Value	\$11,850.00	\$11,850.00	\$11,850.00	N/A	\$10,000.00
Ending Value	\$11,850.00	\$11,850.00	\$11,850.00	N/A	\$11,850.00
Net Change	-\$0.00	-\$0.00	-\$0.00	N/A	\$1,850.00
Basic Return for Acct Num XXXXXETF	0.00%	0.00%	0.00%	N/A	-0.42%
Account # XXXXXX001 - Bobs Index (Mass Mutual) (Since Inception 03/01/2024)					
Beginning Value	\$0.00	\$0.00	\$0.00	N/A	\$0.00
Ending Value	\$0.00	\$0.00	\$0.00	N/A	\$0.00
Net Change	\$0.00	\$0.00	\$0.00	N/A	\$0.00
Basic Return for Acct Num XXXXXX001	0.00%	0.00%	0.00%	N/A	0.00%
Account # XXXXX0001 - Proteus Liquid asset (Charles Schwab) (Since Inception 01/31/2023)					
Beginning Value	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00



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Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Ending Value	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
Net Change	-\$0.00	-\$0.00	-\$0.00	-\$0.00	-\$0.00
Basic Return for Acct Num XXXXX0001	0.00%	0.00%	0.00%	-18.28%	-15.96%

Account # XXXXX8162 - Robert E. Anderson Trust (Dewey, Cheatham and Howe) (Since Inception 05/05/2026)

Beginning Value	\$87,060.00	\$1,000.00	N/A	N/A	\$1,000.00
Ending Value	\$1,000.00	\$1,000.00	N/A	N/A	\$1,000.00
Net Change	-\$86,060.00	\$0.00	N/A	N/A	\$0.00
Basic Return for Acct Num XXXXX8162	-98.85%	0.00%	N/A	N/A	0.00%

Account # XXXXX1234 - Bob's 2nd CD (Test CD Company 2) (Since Inception 01/01/2026)

Beginning Value	\$15,360.00	\$10,000.00	N/A	N/A	\$10,000.00
Ending Value	\$15,360.00	\$15,360.00	N/A	N/A	\$15,360.00
Net Change	-\$0.00	\$5,360.00	N/A	N/A	\$5,360.00
Basic Return for Acct Num XXXXX1234	0.00%	26.42%	N/A	N/A	26.42%



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Individual Account Returns

	Current Quarter	Year To Date	1 Year	3 Years	Since Inception
Account # XXXXXo001 - Test \$0 Account (Crane, Pool & Schmidt) (Since Inception 12/31/2025)					
Beginning Value	\$0.00	\$0.00	N/A	N/A	\$0.00
Ending Value	\$1,000,000.00	\$1,000,000.00	N/A	N/A	\$1,000,000.00
Net Change	\$1,000,000.00	\$1,000,000.00	N/A	N/A	\$1,000,000.00
Basic Return for Acct Num XXXXXo001	0.00%	0.00%	N/A	N/A	100.00%

Returns greater than 1 year are annualized.

Returns are net of fees.